



OFFICE OF THE INSPECTOR GENERAL

APPENDICES [A – H]

Review of Allegations of Failure to Report a
Criminal Misconduct Matter and the Relationship
between the South Carolina Vocational
Rehabilitation Department and ALLIED
Opportunities, Inc.

Appendix – A

Lexington County

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Switch View

The State of South Carolina VS Shane Andrew Leaphart

Case Number:	2014A3210600077	Court Agency:	General Sessions	Filed Date:	07/31/2014
Case Type:	Criminal-Clerk	Case Sub Type:			
Status:	Disposed	Assigned Judge:	Clerk Of Court C P, G S, And Family Court	Disposition Judge:	Solicitor
Disposition:	Nolle Prosequi				
Disposition Date:	04/11/2017	Date Received:	07/31/2014	Arrest Date:	07/29/2014
Law Enf. Case:		True Bill Date:		No Bill Date:	
Prosecutor Case:		Indictment Number:	0000GS32	Waiver Date:	
Probation Case:					

Case Parties

Click the  icon to show associated parties.

Name	Address	Race	Sex	Year Of Birth	Party Type	Party Status	Last Updated
E-Z Out Bail Bonds/Audrea D Walters	528 Gibson Rd Lexington SC 29072				Bond Entity		07/31/2014
Leaphart, Shane Andrew	712 Convent Church Road Leesville SC 29070	White	M	1969	Defendant		04/11/2017
Miller, Rayford	4444 Broad River Road P. O. Box 21787 Columbia 292211787				Officer		07/31/2014

Charges

Name	Charge Code - Charge Description	Original Charge Code - Original Charge	Disposition Date
Leaphart, Shane Andrew	0461-Sex / First degree sexual misconduct with inmate of correctional facility or patient or	0461-Sex / First degree sexual misconduct with inmate of correctional facility or patient or	04/11/2017

trainee of state mental health
facilitytrainee of state mental health
facility

Actions

Name	Description	Type	Motion Roster	Begin Date	Completion Date	Documents
Leaphart, Shane Andrew	Disposition Sheet	Filing		04/11/2017- 08:19		
Leaphart, Shane Andrew	Preliminary Hearing Disposition	Filing		10/31/2014- 16:07	04/11/2017- 16:07	
Leaphart, Shane Andrew	Request for Discovery	Filing		08/28/2014- 16:21	04/11/2017- 16:21	
Leaphart, Shane Andrew	Filing/GS Case File	Filing		07/29/2014- 14:53	04/11/2017- 14:53	
Leaphart, Shane Andrew	Filing/GS Case File	Filing		07/29/2014- 14:52	04/11/2017- 14:52	

Financials

Summary

Fine/Costs: \$0.00	Total Paid for fine/costs:	\$0.00	Balance Due:	\$0.00
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Costs

Description	Cost Code	Amount	Charge Action	Disbursed Amount
Victim Conviction Surcharge \$100 / \$25	CVSRCH	\$0.00		\$0.00
Fine to State 44%	AFINES	\$0.00		\$0.00
Law Enforcement Funding Surcharge \$25	LEFSUR	\$0.00		\$0.00
Fine to General Fund	AFNEGF	\$0.00		\$0.00
SC Criminal Justice Academy Training	SCCJAT	\$0.00		\$0.00
Victim Services Asm 38.0013% / 5.7831%	ASMVIC	\$0.00		\$0.00
State Assessment	STAASM	\$0.00		\$0.00

Payments



Payment Date	Receipt Number	Entered By	Transaction Type Code	Payment Amount
None				

Bonds

Bond Information								
Bond Id	Set Date	Amend Date	Set By	Type	Amount	Type	Amount	Condition
2014BD3210205807	07/29/2014		Reinhart	Cash Bond	\$5,000.00	Surety Bond	\$5,000.00	

Post Information				Posted By
Bond Id	Bond Type	Amount	Date Posted	
2014BD3210205807	Surety Bond	\$5,000.00	07/29/2014	E-Z Out Bail Bonds/Audrea D Walters

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The State of South Carolina VS Shane Andrew Leaphart

Case Number:	2014A3210600076	Court Agency:	General Sessions	Filed Date:	07/31/2014
Case Type:	Criminal-Clerk	Case Sub Type:			
Status:	Sentenced	Assigned Judge:	Clerk Of Court C P, G S, And Family Court	Disposition Judge:	Newman, Jocelyn
Disposition:	Pled Guilty				
Disposition Date:	04/11/2017	Date Received:	07/31/2014	Arrest Date:	07/29/2014
Law Enf. Case:		True Bill Date:		No Bill Date:	
Prosecutor Case:		Indictment Number:	2017GS3201582	Waiver Date:	
Probation Case:					

Case Parties

Click the  icon to show associated parties.

Name	Address	Race	Sex	Year Of Birth	Party Type	Party Status	Last Updated
E-Z Out Bail Bonds/Audrea D Walters	528 Gibson Rd Lexington SC 29072				Bond Entity		07/31/2014
 Land, William Ceth	PO Box 138 Manning SC 29102				Defendant Attorney		04/11/2017
 Leaphart, Shane Andrew	712 Convent Church Road Leesville SC 29070	White	M	1969	Defendant		04/11/2017
Miller, Rayford	4444 Broad River Road P. O. Box 21787 Columbia 292211787				Officer		07/31/2014

Charges

Name

Charge Code - Charge Description	Original Charge Code - Original Charge	Disposition Date
Leaphart, Shane Andrew 3413-Assault / Assault & Battery 2nd degree	2893-Sex / Second degree sexual misconduct with inmate, patient	04/11/2017

Sentencing

And/Or Description	Amount	Units	Begin Date	End Date	Completion Date	Consecutive or Concurrent
1 year upon time served and fine of \$250 bal susp for 1 year probation						

Actions

Name	Description	Type	Motion Roster	Begin Date	Completion Date	Documents
Leaphart, Shane Andrew	Active - Probation	Filing		04/11/2017-10:40		
Leaphart, Shane Andrew	Sentence Issued	Filing		04/11/2017-08:18		
Leaphart, Shane Andrew	Indictment	Filing		04/11/2017-08:17		
Leaphart, Shane Andrew	Request for Discovery	Filing		08/28/2014-16:21	04/11/2017-16:21	
Leaphart, Shane Andrew	Filing/GS Case File	Filing		07/31/2014-13:16	04/11/2017-13:16	

Financials

Summary			
Fine/Costs: \$663.06	Total Paid for fine/costs:	\$663.06	Balance Due: \$0.00

Costs				
Description	Cost Code	Amount	Charge Action	Disbursed Amount
Fine to State 44%	AFINES	\$110.00		\$110.00
Law Enforcement Funding Surcharge \$25	LEFSUR	\$25.00		\$25.00
Victim Services Asm 38.0013% / 5.7831%	ASMVIC	\$95.00		\$95.00

Collection Fee 3%	CFEE3%	\$19.31	\$19.31
Fine to General Fund	AFNEGF	\$140.00	\$140.00
State Assessment	STAASM	\$173.75	\$173.75
Victim Conviction	CVSRCH	\$100.00	\$100.00
Surcharge \$100 / \$25			

Payments

Payment Date	Receipt Number	Entered By	Transaction Type Code	Payment Amount
04/11/2017	200561	jparker	PY	\$663.06

Bonds**Bond Information**

Bond Id	Set Date	Amend Date	Set By	Type	Amount	Type	Amount	Condition
2014BD3210205807	07/29/2014		Reinhart	Cash Bond	\$5,000.00	Surety Bond	\$5,000.00	

Post Information

Bond Id	Bond Type	Amount	Date Posted	Posted By
2014BD3210205807	Surety Bond	\$5,000.00	07/29/2014	E-Z Out Bail Bonds/Audrea D Walters

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The State of South Carolina VS Shane Andrew Leaphart

Case Number:	2014A3210600075	Court Agency:	General Sessions	Filed Date:	07/31/2014
Case Type:	Criminal-Clerk	Case Sub Type:			
Status:	Disposed	Assigned Judge:	Clerk Of Court C P, G S, And Family Court	Disposition Judge:	Solicitor
Disposition:	Nolle Prosequi				
Disposition Date:	04/11/2017	Date Received:	07/31/2014	Arrest Date:	07/29/2014
Law Enf. Case:		True Bill Date:		No Bill Date:	
Prosecutor Case:		Indictment Number:	0000GS32	Waiver Date:	
Probation Case:					

Case Parties Charges Sentencing Associated Cases Actions Financials Bonds

Name	Description	Type	Motion Roster	Begin Date	Completion Date	Documents
Leaphart, Shane Andrew	Disposition Sheet	Filing		04/11/2017-08:19		
Leaphart, Shane Andrew	Preliminary Hearing Disposition	Filing		10/31/2014-16:07	04/11/2017-16:07	
Leaphart, Shane Andrew	Request for Discovery	Filing		08/28/2014-16:21	04/11/2017-16:21	
Leaphart, Shane Andrew	Filing/GS Case File	Filing		07/31/2014-13:15	04/11/2017-13:15	

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Case Number:	2014A3210600075	Court Agency:	General Sessions	Filed Date:	07/31/2014
Case Type:	Criminal-Clerk	Case Sub Type:			
Status:	Disposed	Assigned Judge:	Clerk Of Court C P, G S, And Family Court	Disposition Judge:	Solicitor
Disposition:	Nolle Prosequi				
Disposition Date:	04/11/2017	Date Received:	07/31/2014	Arrest Date:	07/29/2014
Law Enf. Case:		True Bill Date:		No Bill Date:	
Prosecutor Case:		Indictment Number:	0000GS32	Waiver Date:	
Probation Case:					

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Name	Charge Code - Charge Description	Original Charge Code - Original Charge	Disposition Date
Leaphart, Shane Andrew	2893-Sex / Second degree sexual misconduct with inmate, patient	2893-Sex / Second degree sexual misconduct with inmate, patient	04/11/2017

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The State of South Carolina VS Shane Andrew Leaphart

Case Number:	2014A3210600074	Court Agency:	General Sessions	Filed Date:	07/31/2014
Case Type:	Criminal-Clerk	Case Sub Type:			
Status:	Disposed	Assigned Judge:	Clerk Of Court C P, G S, And Family Court	Disposition Judge:	Solicitor
Disposition:	Nolle Prosequi				
Disposition Date:	04/11/2017	Date Received:	07/31/2014	Arrest Date:	07/29/2014
Law Enf. Case:		True Bill Date:		No Bill Date:	
Prosecutor Case:		Indictment Number:	0000GS32	Waiver Date:	
Probation Case:					

Case Parties

Click the  icon to show associated parties.

Name	Address	Race	Sex	Year Of Birth	Party Type	Party Status	Last Updated
E-Z Out Bail Bonds/Audrea D Walters	528 Gibson Rd Lexington SC 29072				Bond Entity		07/31/2014
Leaphart, Shane Andrew	712 Convent Church Road Leesville SC 29070	White	M	1969	Defendant		04/11/2017
Miller, Rayford	4444 Broad River Road P. O. Box 21787 Columbia 292211787				Officer		07/31/2014

Charges

Name	Charge Code - Charge Description	Original Charge Code - Original Charge	Disposition Date
Leaphart, Shane Andrew	0461-Sex / First degree sexual misconduct with inmate of correctional facility or patient or	0461-Sex / First degree sexual misconduct with inmate of correctional facility or patient or	04/11/2017

trainee of state mental health
facilitytrainee of state mental health
facility

Actions

Name	Description	Type	Motion Roster	Begin Date	Completion Date	Documents
Leaphart, Shane Andrew	Disposition Sheet	Filing		04/11/2017- 08:19		
Leaphart, Shane Andrew	Preliminary Hearing Disposition	Filing		10/31/2014- 16:06	04/11/2017- 16:06	
Leaphart, Shane Andrew	Preliminary Hearing Disposition	Filing		10/31/2014- 16:06	04/11/2017- 16:06	
Leaphart, Shane Andrew	Request for Discovery	Filing		08/28/2014- 16:21	04/11/2017- 16:21	
Leaphart, Shane Andrew	Filing/GS Case File	Filing		07/31/2014- 13:13	04/11/2017- 13:13	

Financials

Summary

Fine/Costs: \$0.00	Total Paid for fine/costs:	\$0.00	Balance Due:	\$0.00
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Costs

Description	Cost Code	Amount	Charge Action	Disbursed Amount
Victim Services Asm 38.0013% / 5.7831%	ASMVIC	\$0.00		\$0.00
State Assessment	STAASM	\$0.00		\$0.00
Fine to General Fund	AFNEGF	\$0.00		\$0.00
SC Criminal Justice Academy Training	SCCJAT	\$0.00		\$0.00
Fine to State 44%	AFINES	\$0.00		\$0.00
Law Enforcement Funding Surcharge \$25	LEFSUR	\$0.00		\$0.00
Victim Conviction Surcharge \$100 / \$25	CVSRCH	\$0.00		\$0.00

Payments

Payment Date	Receipt Number	Entered By	Transaction Type Code	Payment Amount
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Bonds

Bond Id	Set Date	Amend Date	Set By	Type	Amount	Type	Amount	Condition
2014BD3210205807	07/29/2014		Reinhart	Cash Bond	\$5,000.00	Surety Bond	\$5,000.00	

Bond Id	Bond Type	Amount	Date Posted	Posted By
2014BD3210205807	Surety Bond	\$5,000.00	07/29/2014	E-Z Out Bail Bonds/Audrea D Walters

[http://cms.lex-co.com/SCJDWeb/PublicIndex/\(X\(1\)Si:amoblgl34nmhbw30i3olix\)/Case](http://cms.lex-co.com/SCJDWeb/PublicIndex/(X(1)Si:amoblgl34nmhbw30i3olix)/Case) 06/10/2017

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The State of South Carolina VS Shane Andrew Leaphart

Case Number:	2014A3210600074	Court Agency:	General Sessions	Filed Date:	07/31/2014
Case Type:	Criminal-Clerk	Case Sub Type:			
Status:	Disposed	Assigned Judge:	Clerk Of Court C P, G S, And Family Court	Disposition Judge:	Solicitor
Disposition:	Nolle Prosequi				
Disposition Date:	04/11/2017	Date Received:	07/31/2014	Arrest Date:	07/29/2014
Law Enf. Case:		True Bill Date:		No Bill Date:	
Prosecutor Case:		Indictment Number:	0000GS32	Waiver Date:	
Probation Case:					

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Name	Charge Code - Charge Description	Original Charge Code - Original Charge	Disposition Date
Leaphart, Shane Andrew	0461-Sex / First degree sexual misconduct with inmate of correctional facility or patient or trainee of state mental health facility	0461-Sex / First degree sexual misconduct with inmate of correctional facility or patient or trainee of state mental health facility	04/11/2017

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The State of South Carolina VS Shane Andrew Leaphart

Case Number:	2014A3210600073	Court Agency:	General Sessions	Filed Date:	07/31/2014
Case Type:	Criminal-Clerk	Case Sub Type:			
Status:	Disposed	Assigned Judge:	Clerk Of Court C P, G S, And Family Court	Disposition Judge:	Solicitor
Disposition:	Nolle Prosequi				
Disposition Date:	04/11/2017	Date Received:	07/31/2014	Arrest Date:	07/29/2014
Law Enf. Case:		True Bill Date:		No Bill Date:	
Prosecutor Case:		Indictment Number:	0000GS32	Waiver Date:	
Probation Case:					

Case Parties Charges Sentencing Associated Cases Actions Financials Bonds

Name	Description	Type	Motion Roster	Begin Date	Completion Date	Documents
Leaphart, Shane Andrew	Disposition Sheet	Filing		04/11/2017-08:19		
Leaphart, Shane Andrew	Preliminary Hearing Disposition	Filing		10/31/2014-16:05	04/11/2017-16:05	
Leaphart, Shane Andrew	Filing/GS Case File	Filing		07/31/2014-13:07	04/11/2017-13:07	

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The State of South Carolina VS Shane Andrew Leaphart

Case Number:	2014A3210600073	Court Agency:	General Sessions	Filed Date:	07/31/2014
Case Type:	Criminal-Clerk	Case Sub Type:			
Status:	Disposed	Assigned Judge:	Clerk Of Court C P, G S, And Family Court	Disposition Judge:	Solicitor
Disposition:	Nolle Prosequi				
Disposition Date:	04/11/2017	Date Received:	07/31/2014	Arrest Date:	07/29/2014
Law Enf. Case:		True Bill Date:		No Bill Date:	
Prosecutor Case:		Indictment Number:	0000GS32	Waiver Date:	
Probation Case:					

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Name	Charge Code - Charge Description	Original Charge Code - Original Charge	Disposition Date
Leaphart, Shane Andrew	0461-Sex / First degree sexual misconduct with inmate of correctional facility or patient or trainee of state mental health facility	0461-Sex / First degree sexual misconduct with inmate of correctional facility or patient or trainee of state mental health facility	04/11/2017

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Appendix - B

The State of South Carolina



Office of Secretary of State Mark Hammond

Certificate of Incorporation, Nonprofit Corporation

I, Mark Hammond, Secretary of State of South Carolina Hereby certify that:

ALLIED OPPORTUNITIES, INC.,
a nonprofit corporation duly organized under the laws of the State of South Carolina on June 17th, 2005, and having a perpetual duration unless otherwise indicated below, has as of the date hereof filed a Declaration and Petition for Incorporation of a nonprofit corporation for Religious, Educational, Social, Fraternal, Charitable, or other eleemosynary purpose.

Now, therefore, I Mark Hammond, Secretary of State, by virtue of the authority in me vested by Chapter 31, Title 33, Code of 1976 and Acts amendatory thereto, do hereby declare the organization to be a body politic and corporate, with all the rights, powers, privileges and immunities, and subject to all the limitations and liabilities, conferred by Chapter 31, Title 33, Code of 1976 and Acts amendatory thereto.

Given under my Hand and the Great
Seal of the State of South Carolina this
17th day of June, 2005.

A handwritten signature in cursive script that reads "Mark Hammond".

Mark Hammond, Secretary of State

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JUN 26 2006

ALLIED OPPORTUNITITES INC
C/O PRESTON H COLEMAN
1410 BOSTON AVE
WEST COLUMBIA, SC 29170

Employer Identification Number:
86-1141590
DLN:
17053187032015
Contact Person:
JENNIFER NICOLIN ID# 95152
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
IRC 170(b)(1)(A)(vi)
Form 990 Required:
Yes
Effective Date of Exemption:
June 17, 2005
Contribution Deductibility:
Yes
Advance Ruling Ending Date:
December 31, 2009

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. During your advance ruling period, you will be treated as a public charity. Your advance ruling period begins with the effective date of your exemption and ends with advance ruling ending date shown in the heading of the letter.

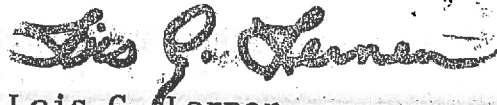
Shortly before the end of your advance ruling period, we will send you Form 8734, Support Schedule for Advance Ruling Period. You will have 90 days after the end of your advance ruling period to return the completed form. We will then notify you, in writing, about your public charity status.

Please see enclosed Information for Exempt Organizations Under Section 501(c)(3) for some helpful information about your responsibilities as an exempt organization.

Letter 1045 (DO/CG)

ALLIED OPPORTUNITITES INC

Sincerely,

A handwritten signature in dark ink, appearing to read "Lois G. Lerner". The signature is fluid and cursive, with the first name "Lois" being more prominent.

Lois G. Lerner
Director, Exempt Organizations
Rulings and Agreements

Enclosures: Information for Organizations Exempt Under Section 501(c)(3)
Statute Extension

Appendix - C

AGENCY BOARD MEETING
South Carolina Vocational Rehabilitation Department
September 27-29, 2005

Tuesday, September 27, 2005, 4:00 p.m. – 5:00 p.m.

Welcome.Chairman Lowder
Approval of Minutes.Chairman Lowder
Comments and Review of Agenda.Larry Bryant
TERI Resolutions.Chairman Lowder

Wednesday, September 28, 2005, 9:00 a.m. – 4:00 p.m.

The Impact of Program Integrity.Kerry Mandeville
Business Relations.Rick Elam
 Rehab Centers – Production Rate
 VRBPN
 JRS
 Placement Rate
 BDS
 Centralization
Human Resource Issues.Eric Moore
 TERI Transition
 Summary of Commissioner's Evaluation
 Agency's Organizational Chart
Professional Development & Leadership Program.Lucerne Iseman
Overview of Audits.Rick Elam
 Audit Structure – Internal and External
 Safety Audits
 Production Audits
 Outside Audits
Image of – Staff, Buildings, and Grounds.Mark Wade
DDS Update.Tom Paige and Shirley Jarrett
 Customer Service
 Teams
 Technology

Thursday, September 29, 2005, 9:00 a.m. – 12:00 p.m.

Budget Update. Preston Coleman
Building Update. Preston Coleman
Case Service Statistics. Larry Bryant
Future Planning. Larry Bryant
Closing Remarks. Derle Lowder

Adjournment

MINUTES
Agency Board Meeting
September 27-29, 2005

Present: Derle A. Lowder, Sr., Chairman
Roxzanne Breland, D.C.
Luke Laffitte
Alease G. Samuels
Joey Thomas
Larry Bryant
Preston Coleman
Rick Elam
Lucerne Iseman

Tuesday, September 27, 2005

Guests: Mark Wade

WELCOME:

Chairman Lowder opened the meeting and welcomed everyone to Wampee. Chairman Lowder made reference to the "good people" leaving in the next few months but knew we had talented employees to put in these positions being vacated.

APPROVAL OF MINUTES:

The minutes from the last board meeting were reviewed. Ms. Samuels made a motion the minutes be accepted as written and Dr. Laffitte gave the second motion.

COMMENTS AND REVIEW OF AGENDA:

Larry Bryant, Commissioner, discussed the transition the Agency is currently experiencing, adding, "we have worked hard to prepare for the TERI (Teacher and Employee Retirement Incentive) employees leaving." He stated this is Preston Coleman's last week as he retires September 30, 2005. Mr. Bryant announced that Rick Elam will officially take over Monday, October 3, 2005. Mr. Bryant reported Mr. Coleman will be on contract to be available to assist the Agency. Mr. Bryant also added Ms. Iseman will remain on contract after she retires to assist the Agency with High School/High Tech. Mr. Bryant discussed

the Bonus Program for the new fiscal year and explained the criteria and different levels of bonus amounts. Chairman Lowder made a motion to continue the Bonus Program for State Fiscal Year 2006 and Mrs. Samuels gave the second motion.

Mr. Bryant stated he had some new business to discuss with the Board, and this would require that Chairman Lowder leave the room. Mr. Bryant stated that due to Chairman Lowder's outstanding support, work, and devotion that he has given to the Agency, he would like to recommend that the Board name the Sumter Training Center his honor. Dr. Breland made the motion to name the Sumter Training Center in honor of Chairman Lowder, and Ms. Samuel gave the second motion. Chairman Lowder was then invited back in the meeting and was told of the Board's motion. Chairman Lowder expressed his appreciation for this honor and what a joy it had been working with the Agency for the past 29 years.

TEACHER AND EMPLOYEE RETIREMENT INCENTIVE (TERI)
RESOLUTIONS:

Chairman Lowder stated that the Board has prepared a resolution for Preston Coleman and a resolution for all those who are under the TERI program retiring by December 2005. Chairman Lowder read the resolution indicating this is for the Board's appreciation of the years of dedication and work given by these employees to the Department. Mr. Bryant stated employees included in this resolution would receive a copy of it. Dr. Laffitte made the motion to accept the resolutions as written and Mrs. Samuels gave the second motion. Chairman Lowder asked Mr. Coleman to come forward and he then presented the resolution written by the Board in his honor. Mrs. Samuels expressed her appreciation to Mr. Coleman and wished him well in his retirement. Mr. Bryant praised Mr. Coleman for his contributions to the Department, adding that he had worked for three Commissioners during his career with the Agency. Mr. Coleman thanked the Board for its "stability and leadership" and Mr. Bryant for his kind comments and support.

Wednesday, September 28, 2005:

Guests: Kerry Mandeville
 Eric Moore
 Mark Wade
 Shirley Jarrett

Brenda Williams
Todd Blake

Chairman Lowder called the meeting to order and welcomed all guests in attendance today. Chairman Lowder stated the Agency had been asked to assist the Hurricane Katrina survivors with needed technology such as computers, laptops, fax machines, etc. Chairman Lowder added the Agency was able to assist with a donation of laptop computers (see attachment).

THE IMPACT OF PROGRAM INTEGRITY:

Kerry Mandeville, Director of Case Services, presented a Power Point presentation on Program Integrity stating the Agency has been measuring this for three years and has gathered data on strengths and weaknesses in the Agency's program. He gave a brief overview of the components and measures of Program Integrity, a summary of the findings, and their impact. Mr. Bryant complimented Mr. Mandeville for the good job he has done in keeping up with all of the data. Mr. Bryant added this information is the "measuring stick" for the bonus program.

BUSINESS RELATIONS:

(Rehab Centers - Production Rate, VRBPN, JRS, Placement Rate, BDS, and Centralization)

Rick Elam, Assistant Commissioner, gave an overview of the "Business Relations." He introduced Brenda Williams and Todd Blake both Training Center Development Specialists, to discuss the Vocational Rehabilitation Business Partner Network (VRBPN). Ms. Williams presented a Power Point presentation of the VRBPN. She stated at present there were 25 members and distributed the newsletter that went out this summer for the Board's review. Ms. Williams reported several promotional meetings had been held throughout the state in order to develop and recruit more business partners. Chairman Lowder asked Ms. Williams to add the Board members to the mailing list to receive the newsletter. Ms. Williams briefly reviewed the work of the Business Development Specialists (BDS) and the increase of income generated by the results of their work. Mr. Bryant added the BDS has also developed good public relations with the business community.

Todd Blake reported on the Training Centers productivity rate. He distributed a data sheet of this year's statistics and explained the information. A discussion

followed about how Training Centers can share contract work and assist other Centers that need additional contract work. Mr. Blake stated this is part of the BDS's job responsibility to see that contract work is shared. Mr. Bryant reported that Greenville is getting an enormous amount of contract work and is looking at the possibilities of finding a warehouse to lease for additional space in Greer.

Mr. Elam asked the Board to review the charts for Comparative Sales and Gross Sales for the Training Centers. All figures were reviewed and explained. Mr. Elam discussed the centralization projects that were implemented this year and their current status.

HUMAN RESOURCE ISSUES:

(TERI Transition, Summary of Commissioner's Evaluation, and Agency's Organizational Chart)

Mr. Eric Moore, Director of Human Resources, spoke about the Department's efforts to manage the personnel and leadership transition caused by employees retiring under the Teacher and Employee Retirement Incentive (TERI) program. He highlighted the management positions which have and will be impacted by these retirements and detailed the Agency's efforts to fill those positions. He stated that under the leadership of the Commissioner, the Department's Executive and Senior Management teams have worked diligently to ensure a smooth transition. The Department has planned for this transition, and initiatives such as the Professional Development and Leadership Program (PDLF) have minimized the negative impact of losing this large number of leaders throughout the organization.

Mr. Moore shared an organizational chart showing the Executive and Senior staff positions at the State Office which included the current staff changes. He reported that the Executive and Senior staff will have two fewer positions after this transition. This is a result of combining and redistributing job roles among existing staff to save positions.

Mr. Moore covered the highlights of the Commissioner's 2004/2005 performance evaluation. He reported during this past fiscal year the

Department placed more clients in competitive employment, per capita, than any other state in the nation and we did this at the lowest cost per closure in the nation. Mr. Moore also detailed the structure of the document stating the Objectives are based on the Baldrige Criteria. He then reviewed the various achievements under the 6 Objectives on the Commissioner's evaluation. Chairman Lowder complimented Mr. Moore and Ms. Cathy Smith for the great job they did on the Commissioner's evaluation.

PROFESSIONAL DEVELOPMENT AND LEADERSHIP PROGRAM (PDLP):

Ms. Lucerne Iseman, Assistant Commissioner, gave an overview of the new Professional Development and Leadership Program (PDLP) which includes Disability Determination Services. She indicated that in this new program, the Steering Committee is given additional responsibilities in overseeing the program. She reviewed the competency areas: Basic, Intermediate, and Advanced. Ms. Iseman explained each area and who would be involved. Ms. Iseman reported that 31 employees who were in the former program have been promoted. Mr. Bryant stated this program has assisted greatly in succession planning. Dr. Breland requested that we look at including all new employees in the Basic area of the program.

OVERVIEW OF AUDITS:

(Audit Structure - Internal and External, Safety Audits, Production Audits, and Outside Audits)

Rick Elam, Assistant Commissioner, gave an overview of the internal and external audits regarding safety audits, production audits, and outside audits. Mr. Bryant explained the Agency's audit system and how the Area Development Directors follow-up on audits in their assigned offices. Mr. Coleman indicated the safety program has been very beneficial to the Department and the impact it has had on the safety of staff and clients. Mr. Bryant discussed the Safety Rehab Issues Institute that Ms. Iseman is planning. He also added the Agency is continuing to work on a plan to make the offices more secure.

DISABILITY DETERMINATION SERVICES (DDS) UPDATE:

Ms. Shirley Jarrett, Assistant Director of Disability Determination Services (DDS), reported that DDS finished the 2005 fiscal year with extraordinary statistics. She stated they adjudicated 80,475 claims with a production per work year of 264.2, which was higher than both regional (253.7) and national (260.1).

The Medicaid state claims also completed their first full fiscal year, adjudicating 7,018 claims for the year with an average processing time of 42 days.

Ms. Jarrett stated these accomplishments were the result of many initiatives throughout the year. Customer Service training was completed in all offices and offices were reorganized into teams rather than units. She reported the team concept has worked well as in the past staff have been concerned with their own statistics and not really involved in team or office statistics. Ms. Jarrett reported that DDS also expanded the pilot of the alternative work schedule to include all of the Columbia Regional office after a successful pilot was completed by Team 2 in Columbia. She reported both of these initiatives enhanced office morale. Ms. Jarrett announced that each office now has a newsletter, with the Greenville office being the best newsletter so far. She stated that DDS is considering expanding training in the next fiscal year to include Team Building.

Ms. Jarrett reported that in the area of Technology DDS has had a number of accomplishments. The fiscal interface was completed, stating this eliminated the need for double keying on each bill, thus streamlining the process of bill payment and allowing DDS to centralize this process into the State Administrative Office. She reported DDS has expended the Dual Monitor system deployment which on the average increases the productivity of an examiner by 24% and a medical consultant by 20%. She announced that DDS will be installing the future dual monitors in the Call Center and other modifications that will increase each office's ability to provide exceptional customer service. Ms. Jarrett added that finally DDS became IDA certified on September 26, 2005, which means from now on DDS will process the vast majority of initial and reconsideration claims without a paper folder. She concluded her presentation by stating "Tom Paige and I are both very proud of the staff accomplishments this year."

IMAGE OF STAFF, BUILDINGS, AND GROUNDS:

Mr. Mark Wade, Director of Public Information, stated one of the Commissioner's Nine Expectation for the Area Offices and Work Training Centers is "maintaining professional appearance of buildings, staff and grounds." Mr. Wade then presented a video that showed the buildings, grounds, and staff of Vocational Rehabilitation offices throughout the state.

Thursday, September 29, 2005

BUDGET UPDATE:

Mr. Preston Coleman, Deputy Commissioner, gave a budget update. He reviewed the graphs in the packet stating the total Agency Budget for State Fiscal Year 2006 is \$109,421,114. As of September 15, 2005, with 21 percent of the year completed, \$27,852,295 (or 25% of the budget) has been authorized, and \$23,524,008 (or 21%) has been paid.

Mr. Coleman reported the total budget for the Administrative Basic Services Program is \$53,717,296; \$15,023,392 (or 30%) has been authorized, and \$12,626,846 (or 24%) has been paid. He stated the total budget for the Case Service Expenditures for this fiscal year, with 21 percent of the year completed, is \$8,336,250. \$2,191,131 (or 26%) has been authorized and \$1,134,372 (or 14%) has been paid. Mr. Coleman also reviewed the ending totals for Fiscal Year 2005 adding that "the Agency finished the year very well and have begun this year the same."

BUILDING UPDATE:

Mr. Preston Coleman, Deputy Commissioner, gave an update on the buildings and the major projects. He stated we are getting a new storage building in Walterboro because of a unique contract with Westinghouse, which may involve contract work for other Centers. The swimming pool at the Muscular Development Center has major issues and is in need of renovation. Mr. Coleman stated as previously mentioned, we are continuing to work on a state-wide security project now involving an architect consultant. There will be new roofs on the Aiken and Lexington office. Mr. Bryant reiterated that the Agency is looking for property in the Lyman area due to the volume of contract work for the Greenville area. The other area of interest is a new building in Hartsville. Mr. Bryant reported the Agency is renting the Richland Center and would like to acquire some land from the Department of Mental Health to build on.

CASE SERVICE STATISTICS:

Mr. Larry Bryant, Commissioner, reviewed the graphs regarding the final figures for Fiscal Year 2005. The Agency achieved 13,606 IPE's and 8,729 successful closures which exceeded both goals. Mr. Bryant stated the Agency is off to a good start for Fiscal Year 2006 adding we will hopefully exceed the goals again this year. He reported the goals for this fiscal year are IPE's 12,558 and for 26 Closures it is 8,562.

FUTURE PLANNING:

Mr. Larry Bryant, Commissioner, reported that the Agency is looking into a new opportunity and has submitted paperwork to the Federal Government for permission to have a program called Allied Opportunities. This program involves contract work that is sometimes too complicated for most of our clientele. The program would employ clients to perform the contract work and the Agency could close these cases in status 26. Mr. Bryant stated Mr. Coleman and Mr. Elam visited Mississippi to view their programs using this concept.

CLOSING REMARKS:

Chairman Lowder announced that today is Mr. Coleman's last official day of employment as Deputy Commissioner. He again stated that Mr. Coleman will continue on a contractual basis and will also assist Wes Stokes on the building program. Chairman Lowder then presented Mr. Coleman with a plaque for his excellent contributions to the Department.

Meeting Adjourned

AGENCY BOARD MEETING
SOUTH CAROLINA
VOCATIONAL REHABILITATION DEPARTMENT
September 27-29, 2006

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Wednesday, September 27, 2006, 4:00 p.m. – 5:00 p.m.

Welcome. Chairman Lowder

Approval of Minutes.Chairman Lowder

Comments and Review of Agenda.Larry Bryant

Public Relations Issues.Mark Wade

Upcoming Legislative Activities.Mark Wade

SCVRD/Business Partnership & Impact (Video).Mark Wade

Thursday, September 28, 2006, 9:00 a.m. – 12:30 p.m.

SCVRD – Present Status & Future Plans

Facilities Update. Pat Green & Rick Elam

- ▀SFY 2006 Training Center Results
- ▀Existing Partnerships
- ▀Allied Opportunities
- ▀New Initiatives
- ▀Expansion of Business Development Specialists

Programmatic Update. Barbara Hollis & Jay Rolin

- ▀RSA Site Visit
- ▀Centralization & Reallocation of Resources
- ▀School to Work Transition Efforts
- ▀Enhanced Case Management System

Thursday, September 28, 2006, Continued

Agenda - Page 2

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Human Resources Development Update. .Debra Moses & Belinda Langton

- SFY 2006 Training Summary
- Change Training
- PDLP
- New Supervisors' Training

DDS Update. Shirley Jarrett & Margaret Yeats

- Management Philosophy
- QUEST & Regional Councils
- FFY 2007 Accomplishments
- Disability System Improvement (DSI)

Summary of Commissioner's Evaluation.Eric Moore

Friday, September 29, 2006, 9:00 a.m. – 10:00 a.m.

Internal Audits. Rick Elam

Budget Update.Rick Elam

Case Service Statistics.Larry Bryant

Closing Remarks.Chairman Lowder

Adjournment

MINUTES
Agency Board Meeting
September 27-29, 2006

Present: Derle A. Lowder, Sr., Chairman
H. L. Laffitte, M.D., Vice-Chairman
Roxzanne Breland, D.C., Board Member
Rhonda Presha, Board Member
Alease Samuels, Board Member
Joseph Thomas, Board Member
Larry Bryant, Commissioner

Staff: Rick Elam, Assistant Commissioner
Pat Green, Area Development Director
Barbara Hollis, Assistant Commissioner
Shirley Jarrett, DDS Assistant Director
Belinda Langton, Director, Training & Staff Development
Eric Moore, Director, Human Resources
Debra Moses, Assistant Commissioner
Jay Rolin, Director, Information Technology
Mark Wade, Director, Public Information
Margaret Yeats, DDS Development Director

Wednesday, September 27, 2006

WELCOME:

Chairman Lowder called the meeting to order, welcoming everyone to Wampee, and briefly discussed his meeting with Regina Luster, RSA Liaison for South Carolina. He shared with the Board about his recent surgery and stated he is recovering well.

APPROVAL OF MINUTES:

The minutes from the last board meeting were reviewed. Mr. Joey Thomas made a motion the minutes be accepted as written, and Ms. Rhonda Presha gave the second motion, and the Board voted unanimously.

COMMENTS AND REVIEW OF AGENDA:

Mr. Larry Bryant, Commissioner, thanked the Board for their commitment for this three-day meeting. He stated it gives the Board and staff the opportunity to "review where we are as an Agency and where we are headed." Mr. Bryant reviewed the agenda, briefly noting each topic. He announced that Tom Paige was out-of-state at a meeting, and Shirley Jarrett would be presenting in his place. Mr. Bryant also noted the importance of the Board getting to know and interact with the new staff that would be in attendance on Thursday.

PUBLIC RELATIONS ISSUES:

Mr. Mark Wade, Director of Public Information, spoke about the new awareness on issues that Public Information has had to respond to such as the Spartanburg and Greenwood cases regarding vulnerable adults in Training Centers, the Laurens case with a staff member with legal issues, and harassment issues. Dr. Breland asked if the state's liability insurance covered the lawsuit dealing with sexual harassment. Mr. Bryant stated there is coverage, and it does not have a financial limit on suing the State. Mr. Wade stated that two formalized training sessions for staff have addressed these issues. The Rehabilitation Institute on Safety included instruction on harassment, overview on mental illness issues, crisis intervention techniques, workplace violence, and workplace safety. Mr. Wade reported that Media Relations training with Sam McCuen was a day-long workshop for Senior Managers on how to deal with the media during times of crisis. Mr. Wade stated this training included role playing and mock news conferences. He explained that this is a proactive effort to help us deal with issues that seem to be on the rise in our society and therefore in our facilities. Mr. Wade reported ongoing initiatives with Public Information, which included a handout of news clippings from the past year; National Disability Employment Awareness Month and Disability Mentoring Day; promotion of the Governor's Committee Journalism Contest, television and radio public service announcements, and Carolina Works which airs on the third Saturday of each month on SCETV at 7:30 p.m.

UPCOMING LEGISLATIVE ACTIVITIES:

Mr. Mark Wade stated the budget requests from the Governor started early this year. Funding initiatives for which the Agency will be pursuing legislative support include Lyman Project and School-to-Work

Transition Services. He added that we are asking for \$500,000 for School-to-Work Transition (which would bring a 4-1 federal match) and \$1.5 million to construct the Training Center in Lyman, which SCVRD would match with other funds. He stated the Area Supervisors are making numerous out-of-session legislative contacts. Mr. Wade reported that restructuring is likely to be an issue in 2007. Mr. Wade announced that the Legislative Breakfast is scheduled for Thursday, March 1, 2007.

SCVRD/BUSINESS PARTNERSHIP & IMPACT (Video):

Mr. Mark Wade played the video his staff had completed featuring the Agency and its business partners titled *Breaking New Ground*. Chairman Lowder asked if the packaging of NARP products in Greenville had any insignia of the Agency. Mr. Bryant was not aware if that was part of the contract and asked Mr. Wade to follow-up on this question. The Commissioner briefly discussed the Business Development positions as to how they are working statewide to develop contracts and how successful this concept has proven to be.

MISCELLANEOUS:

Mr. Bryant asked staff to leave the room to cover some topics with the Board. Mr. Bryant proposed that the Bonus Program be continued for 2007 and Ms. Presha made a motion the Bonus Program for 2007 be approved, and Mrs. Samuels made the second motion, and the Board voted unanimously. Mr. Bryant then asked that the Board approve an up-to five percent pay increase for all employees. After discussion, Dr. Breland made the motion for the employees of the Agency to receive an up-to five percent pay increase, and Dr. Laffitte gave the second motion, and the Board voted unanimously.

Thursday, September 28, 2006

SCVRD PRESENT STATUS & FUTURE PLANS:

Facilities Update:

SFY 2006 Training Center Results: Mr. Rick Elam, Assistant Commissioner, updated the Board on the Training Center financial activities for last year and presented data on total sales income, payroll, and contract contributions for the past eight years. (See attachment).

Mr. Elam reported that State Fiscal Year 2006 was very good and that all of these measures peaked last year to highest levels reached over the past eight years. This was due in large part to the efforts of the Business Development Specialists who have been energetically seeking out new contracts with local businesses.

Ms. Pat Green, Area Development Director, stated it is an “exciting time in the life of the Training Centers.” She reported that there are expanded relationships with business and industry, and now there is more highly skilled technical and non-traditional contract work being performed as shown in yesterday’s video presentation.

Existing Partnerships: Ms. Pat Green updated the Board on Training Center Contracts. She stated that North American Rescue Products (NARP) is located in Greenville, and the clients are assembling dessert packs for soldiers. Ms. Green reported that this involved twenty-five separate steps and the training of thirty to forty clients. Ms. Green stated the plans are to add new products and processes for this contract. Ms. Green reported on the Freightliner contract in Gaffney, which presently trains fifteen clients that assemble chassis for the school buses. She expects the future growth in the next three months will necessitate the training of twenty to twenty-five clients. Ms. Green stated that the Agency plans to consolidate this contract to one facility as it is housed now in two separate locations. Ms. Green reported the Walgreen’s Distribution Center in Anderson is doing well with nine clients trained for three different jobs. The future plans are to add cash register training, leading to employment in retail stores. Ms. Green announced that the Distribution Center will open January 7, 2007.

Allied Opportunities: Ms. Pat Green stated Allied Opportunities is a new concept for the Agency. She explained that it is a non-profit Community Rehabilitation Program and is based on similar operations of the Mississippi Department of Vocational Rehabilitation Services that also operate Job Readiness Training (JRT) facilities. Ms. Green stated that our Training Centers face the dual challenge of preparing clients for employment while also meeting businesses’ expectations with a transitional work force. Ms. Green stated that Allied Opportunities provides the opportunity to employ a few well-prepared clients to help meet expectations while also meeting our client-service needs.

New Initiatives: Ms. Pat Green stated the Williamsburg Training Center building is almost complete, with start-up equipment, vehicles, and supplies ordered. She reported we are exploring community relationships such as Adult Education and the local County Council. The contract with CPT Meds (American Tri Star) has been secured for this location. Ms. Green stated that there are plans to meet in October with the Human Resource Director to discuss our Agency and identify entry skills and employment expectations for this contract.

Mr. Rick Elam updated the Board on the Lyman Project. He stated that the Joint Bond Review Committee and the Budget and Control Board have approved the purchase of 9.5 acres of land from the Town Of Lyman for price of \$283,000. The land would be used for construction of a Vocational Rehabilitation Center. The facility will house counselors and other service professionals as well as a Training Center. It will offer counseling and guidance, vocational assessment, and job-readiness training like other Vocational Rehabilitation centers in the upstate. He noted that it will also offer specialized services such as occupational and physical therapy, rehabilitation engineering, a pain management clinic, an amputee clinic, brain injury services, and other employment related services for people with disabilities. Ms. Presha wanted to know the time line for completion of the Lyman Project, and Mr. Elam responded that matching funds have been requested in the Fiscal Year 2008 budget. If approved, the funds would be available around November, 2007, and it will then be approximately six to eight months for the completion of the facility. Dr. Breland suggested getting staff in-put as to the need of services, as well as including input of staff from Roger C. Peace for brain injury clients.

Expansion of Business Development Specialists: Ms. Green announced there are now nine Business Development Specialists who cover the entire state. They all have business and marketing backgrounds and are building relationships and are generating new contracts for the Training Centers. She noted they also work closely with the Training Center Managers.

Programmatic Update:

RSA Site Visit: Ms. Barbara Hollis, Assistant Commissioner, stated that Regina Luster, our temporary state liaison from Rehabilitation

Services Administration (RSA), visited the Agency on August 28th through August 30th. Ms. Hollis stated that Ms. Luster met with partners from Protection and Advocacy, Client Assistance Program, Disability Action Center, and the South Carolina Independent Living Council. Ms. Hollis stated all visits went well and Ms. Luster received positive feedback. Ms. Hollis added that partnerships will be a major focus of the Agency's reviews in the future. The next site visit is tentatively scheduled for 2008. Ms. Hollis stated Ms. Luster also met with Chairman Lowder, Carol Anderson who is the Area Supervisor of the Florence Area Office, and three counselors in the Charleston Area Office. She stated she again received good feedback. Ms. Luster also spent time reviewing the Agency's State Plan which is another major focus of upcoming reviews from RSA. Ms. Hollis stated RSA will also be developing an annual report card based on data that is already collected. Ms. Hollis reported that a proposed Protocol for Monitoring is currently being reviewed by State Directors and by the Council of State Administrators for Vocational Rehabilitation (CSAVR).

Centralization & Reallocation of Resources: Ms. Barbara Hollis stated that the Agency has completed the centralization of procurement duties and has centralized most of the accounting duties. Ms. Hollis added that procurement is now more consistent statewide with four staff members performing the duties, and the process is more streamlined. Ms. Hollis reported that, as for accounting with currently six staff members, we have centralized most of those functions. Ms. Hollis stated in the future the Agency may look at streamlining the training center payroll. Ms. Hollis added that the centralization of procurement and accounting has saved approximately twenty to twenty-five positions. She stated the centralization of psychological services has saved approximately ten to fifteen positions. Ms. Hollis stated, as discussed in the last Board meeting, that due to centralization the Agency is now able to add resources back into the areas of direct client service delivery roles. These positions will be utilized to serve clients with brain injury, spinal cord injury, mental illness, deaf and/or hard-of-hearing, and transition students. Ms. Hollis reported that instead of cutting positions and streamlining, the Agency can now re-direct positions. Ms. Hollis announced that fourteen new employment coach roles have been added for extension caseloads and eight new Client Service Coordinator roles. Ms. Hollis reported that we are adding nine

new staff to help with the High School/High Tech efforts which will consist mostly of Employment Coaches and/or CPE specialists. Also, additional hours for part-time staff have been allotted to each area office to answer phones, as the demonstration projects with automated answering systems were not effective and/or customer friendly, so they are being discontinued.

School to Work Transition Efforts: Ms. Hollis stated that new positions for High School/High Tech will be added to the original five sites. Those areas are Greenville, Greenwood, Richland, Sumter, and Charleston. She stated there are plans to expand to Gaffney, Anderson, Florence, and Conway. The transition efforts include an emphasis on proposed regulations. She added that the Agency will have to work with more students without additional funding. Ms. Hollis reported the Rehabilitation Issues Institute for Transition Services titled "Transition Works" will be conducted next week on October 4th and 5th.

Enhanced Case Management System: Mr. Jay Rolin, Director of Information Technology, updated the Board members on the Case Management System (CMS). Mr. Rolin presented a power point presentation that outlined the concepts and benefits of the new CMS system. He stated the new CMS systems will be designed for an electronic file environment. All case information will be captured and case monitoring will be automated. He added that the Social Security numbers will not be printed on any documents. Mr. Rolin stated the mission of the new CMS system is "To develop and implement a client-centered case documentation and management system that follows the natural progression of the rehabilitation process and supports the integrated service delivery system in an intuitive and user-friendly format." He reported the first phase of the project has been implemented, and we have received good feedback from the field staff on the new system. Information Technology and Case Services have worked closely together on this project to insure that the new CMS project meets the needs of our counselors and other field staff.

Human Resources Development Update:

SFY 2006 Training Summary: Ms. Debra Moses, Assistant Commissioner, acknowledged the accomplishments of the Human Resource Development Team during 2006 state fiscal year under the

direction of Ms. Belinda Langton. She also credited Mrs. Teri Norris, Training Coordinator, and Ms. Angela Butzon, Training Assistant, with the success of this unit. Mr. Scott Page is the multi-media staff member from Information Technology working with this team in video conferencing training sessions throughout the state and is doing a great job. Ms. Belinda Langton, Director of Training and Staff Development reviewed the training offered and completed during this past fiscal year.

Change Training: Ms. Belinda Langton, Director of Training and Staff Development, stated the employees of the Agency have experienced many changes in recent years, including agency restructuring, the centralization of bill payment, as well as changes in personnel duties and job titles. Ms. Langton stated, to assist in dealing with the effects of change in the workplace, a training session called "Taking Charge of Change" was developed by the staff of the Human Resource Development (HRD) Center. She stated this training was previously provided to support staff members at Disability Determination Services, and is now underway statewide in the Area Offices of the General Program. The HRD staff is providing this training with the assistance of peer trainers, including participants from the Professional Development and Leadership Program. Ms. Langton reported that to date, 18 training sessions have been conducted for the General program. The HRD staff and peer trainers are scheduled to present thirty additional sessions. The sessions have been well-received; and, as a result, the program was submitted to be considered for the RSA Commissioners Award for Excellence.

Professional Development Leadership Program: Ms. Debra Moses provided an update of the Professional Development Leadership Program (PDLP). She stated the PDLP is off to a great start. She explained that the Steering Committee is overseeing the activities of PDLP, and, for the first time, we will have a beginning and exit timeframe. The Steering Committee re-assessed the number of staff interested in the PDLP and those already involved in the Professional Development Program (PDP) and required them and any other staff interested to reapply and/or apply. As a result of this effort, there are a total of sixty-nine participants for the Level I training and twenty participants for the Level III portion. She announced that in the future, we will have three levels, that will include Level II, but we are

presently working with only Level I and Level III participants. Ms. Moses explained that Level I is inclusive of the Disability Determination Services staff, and Level III is the advanced level participants who have already completed the basic Professional Development Program (PDP) curriculum. She added that in Level III, Career Coaches have been selected and trained. Ms. Moses reported that it is the Steering Committee's goal to add accountability in the Career Coach and Participant relationship by implementing an Individualized Development Plan (IDP). The IDP will identify short and long term goals for the participants in attaining specific developmental skills needed to achieve their career goals. Ms. Moses stated that Human Resource Development is managing the PDLP program and doing a great job with their limited staff.

New Supervisors' Training: Ms. Belinda Langton reported the training for New Supervisors has been revised. She stated the new training includes orientation to State Office departments; on-line orientation to State Office departments in which new supervisors complete the on-line orientation modules; field training; and mentoring. Ms. Langton stated that due to the vast range of experiences new supervisors bring to the job, this training is customized to meet each supervisor's needs.

Chairman Lowder thanked Ms. Langton and her staff for their hard work and the accomplishments they have achieved and stated the Board supported hiring a new staff member for their division.

Disability Determination Services Update:

Management Philosophy: Ms. Shirley Jarrett, Assistant Director, reported that Disability Determination Services (DDS) has changed its management philosophy and is currently embracing the Ten Expectations. She then reviewed with the Board the ten expectations. Ms. Jarrett stated that one of the philosophical changes is Customer Service Training, adding that it is now incorporated into the culture of DDS. Ms. Jarrett stated Teambuilding Training has now been added to DDS and is scheduled to begin this fiscal year. Ms. Jarrett stated there is an initiative to increase the number Examiners so that the ratio will be the same as that of other staff. Ms. Jarrett explained that DDS is able to hire additional Examiners after reviewing and redefining support staff roles and centralizing processes. Mr. Jarrett stated that DDS will be providing clear accountability measures and holding staff

accountable to those measures. There is an Issue Program Integrity Memo provided annually which details the parameters for performance on Production, Compliance Assurance, and Customer Service. Mr. Bryant added that DDS is in the "best shape" it has ever been in. Ms. Presha agreed as she stated it had made numerous changes since her involvement on the Board, adding all of which have been positive. Chairman Lowder stated that DDS has handled all of the changes very well, and they are a "model at the national level."

QUEST and Regional Councils: Ms. Margaret Yeats, DDS Development Director, presented on QUEST and the DDS Regional Councils. She explained that these groups were established in January 2006 to assist with communication, which is one of the ten expectations. The goal is to improve communication that takes place within and between the regional offices and administrative office. She stated that QUEST, the "Quorum for Evaluation of Strategic Tasks", is a group of DDS senior staff members from different disciplines. They discuss items that are referred both from the Regional Councils and the DDS Director and/or Assistant Director. They provide recommendations to the Director and the Assistant Director from a statewide perspective and attempt to improve consistency between regional offices. Ms. Yeats reported that the DDS Regional Councils were established in January 2006 and are comprised of representatives from all staff positions and areas in the regional office. She explained the purpose is to provide a forum for discussing concerns and suggestions in a setting that brings together different perspectives. Ms. Yeats stated they discuss issues related to office atmosphere as well as case-related issues. She closed her presentation by adding both concepts are working very well.

FFY 2006 Accomplishments: Ms. Shirley Jarrett stated that DDS has embraced the new technology, Independence Day Assessment (IDA), which was certified in September, 2005. She explains that this means DDS can now process the majority of cases electronically. She added the results of this process make a tremendous difference in the production of determinations. Ms. Jarrett stated the Initial Pending national goal is important for budgetary and credibility reasons for the Social Security Administration. She stated that the South Carolina DDS program is helping the nation achieve this goal in several ways. She added that we are offering medical ratings assistance to other

states within the region and two staff members went to Nevada for two weeks to adjudicate initial claims. She then gave a brief review of the Federal Fiscal Year statistics for 2006.

Disability System Improvement (DSI): Ms. Shirley Jarrett reported that on a national scale the Federal Fiscal year for 2007 brings a new Commissioner for the Social Security Administration, the Disability Service Improvement (DSI) which includes the eCat (a software tool which will be used in case analysis), and the Disability Quality Review. This review will be national with a pilot in this region. Ms. Jarrett closed her presentation by stating that overall DDS is looking at another productive year in which we will be able to insure that our new staff members are trained to the fullest and capable of moving forward as more changes to the system and program occur.

SUMMARY OF COMMISSIONER'S EVALUATION:

Mr. Eric Moore, Director of Human Resources, presented the results of the Commissioner's performance evaluation to the Board. He stressed that despite the impact of the TERI retirements on the Agency's productivity, the Department experienced another good year. The agency ranked second nationally in successful rehabilitations per 100,000 population and again led the nation by having the lowest cost per rehabilitation. He noted that under the Commissioner's leadership the Agency streamlined and centralized administrative functions which allowed the Agency to save a number of positions and redirect those positions towards direct client service delivery. These positions were targeted towards working with individuals with the most significant disabilities. Mr. Moore noted the many cost saving efforts implemented by the Commissioner which have resulted in millions of dollars in funding being made available to serve clients. Finally, he noted the Commissioner's involvement in providing input on the reauthorization of the Workforce Investment Act.

MISCELLANEOUS:

At this time it was announced by Ms. Barbara Hollis that we had just received confirmation that Mr. Bryant has won the Milliken Medal of Quality Award which will be presented to him on October 17 at the Governor's Quality Award Conference.

FRIDAY, SEPTEMBER 29, 2006

INTERNAL AUDITS:

Mr. Rick Elam gave an overview of Internal Audit Department which has merged with the Inventory and Records Retention Department and stated that John Sandifer was just promoted to the Acting Audits Manager position. Mr. Sandifer was Center Manager at the Orangeburg Training Center and with this experience, as well as previous experience in Finance and Audits, will bring a new perspective and credibility to the Audit Department. The department continues to perform Training Center audits; computer usage audits; and, in the future, will increase the scope of the audits that review the revolving fund, purchase of commodities, as well as, JRT and OTJ program procedures and check distribution. Mr. Lowder asked if any progress has been made in standardizing the names of Training Center Advisory Boards, and Mr. Elam said he would look into the matter and present his findings at the next Board meeting. Some discussion followed regarding the Training Center accounts and how the funds were used and Mr. Bryant stated that this could be an agenda item for the December Board meeting.

BUDGET UPDATE:

Mr. Rick Elam also gave the budget update presenting graphs outlining the Agency's expenditures for State Fiscal Year 2007. He reported the total Agency Budget for the Fiscal Year is \$113,534,778. As of August 31, 2006, with 17 percent of the year completed, \$22,739,155 (20%) has been authorized, and \$17,457,897 (15%) has been paid. The Total budget for the Administrative and Basic Services Program is \$56,520,952; \$13,775,309 (24%) has been authorized, and \$9,429,311 (17%) has been paid. The total budget for Case Service Expenditures is \$8,216,250. \$1,598,302 (19%) has been authorized and \$636,902 (8%) has been paid.

CASE SERVICE STATISTICS:

Mr. Larry Bryant reviewed the case service statistic charts for Fiscal Year 2006 with the end results. He stated the Agency fell short of their IPE and 26 closure goal as previously discussed at the last Board Meeting. Mr. Bryant then reviewed the progress made for Fiscal Year 2007 noting that we are off to a good start "not just in making the

numbers but in serving the clients.” Mr. Bryant took this opportunity to share with the Board an article written by Andy Brack that appeared electronically in the Statehouse Report titled State Swimming in Expired Positions. He stated the article gave the total number of expired Board positions in state agencies and remarked that this is the responsibility of the Governor.

CLOSING REMARKS:

Chairman Lowder asked if anyone had any additional feedback or comments. He thanked the Board members for their attendance and support and stated his appreciation to the staff for their presentations.

MISCELLANEOUS:

Mr. Bryant stated he had received an e-mail this morning confirming that the State Plan has been approved by RSA. Ms. Debra Moses announced that plans are going well for the SCVRA Conference to be held February 11-13, 2007, at the Marriott Hotel in Columbia.

Ms. Alease Samuels made a motion the meeting be adjourned, and Dr. Roxzanne Breland gave the second and the motion carried.

Meeting Adjourned

Completed 10/5/06

AGENCY BOARD MEETING
South Carolina
Vocational Rehabilitation Department
March 21, 2007

Welcome and Introduction.	Chairman Lowder
Approval of Minutes.	Chairman Lowder
Comments and Review of Agenda.	Larry Bryant
SCVRA Meeting Feedback.	Debra Moses
Rehab Issues Institute – Leadership Feedback.	Barbara Hollis
Focus Groups.	Barbara Hollis
Legislative Update.	Mark Wade
Advisory Board Accounts.	Rick Elam
Safety Audits.	Jeb Batten
Internal Audits.	John Sandifer
Budget Update.	Rick Elam
Case Service Statistics.	Linda Lieser
Training Center Mid-Year Report.	Bob Oppermann

MINUTES
Agency Board Meeting
March 21, 2007

Present: Derle A. Lowder, Sr., Chairman
H. L. Laffitte, M.D., Vice-Chairman
Roxzanne Breland, D.C., Board Member
Rhonda Presha, Board Member
Joseph Thomas, Board Member
Marge Butler, Governor's Office
Larry Bryant, Commissioner

Staff: Rick Elam, Assistant Commissioner
Barbara Hollis, Assistant Commissioner
Linda Lieser, Director of Case Services
Neil Lown, Safety and Risk Management Specialist
Debra Moses, Assistant Commissioner
Bob Oppermann, Director of Field Operations
John Sandifer, Acting Audits Manager

Guest: Larry Barker, Ph.D., Governor's Office

WELCOME:

Chairman Lowder called the meeting to order, welcoming Larry Barker and everyone else to the meeting. He stated that Mr. Evatt and Ms. Samuels were both unable to attend the meeting today. He asked Ms. Rhonda Presha to open the meeting with the invocation.

Chairman Lowder then presented Dr. Larry Barker a plaque in appreciation of his 13 years of service to the clients of the Agency and read the inscription on the plaque. Dr. Barker thanked the Agency Board for this honor and their support during his tenure. Larry Bryant, Commissioner, stated that Dr. Barker has been promoted to Director of Administrative Services in the Governor's office. Marge Butler will be replacing him, and Mr. Bryant added "we look forward to working with her as she will do a great job and is an advocate for clients."

APPROVAL OF MINUTES:

The minutes from the last board meeting were reviewed. Ms. Rhonda Presha made a motion the minutes be accepted as written, and Mr. Joey Thomas gave the second motion. The Board voted unanimously.

COMMENTS AND REVIEW OF AGENDA:

Mr. Larry Bryant, Commissioner, stated it had been a busy quarter with the Lyman news conference in February and the SCVRA Conference in March, both successful events. He then very briefly reviewed each agenda item. He stated that Neil Lown will be presenting on behalf of Jeb Batten who is on military leave. Mr. Bryant asked the Board if they had a preference for a date in September for the Agency Board Meeting at Wampee. They responded they did not and he then requested Mr. Rick Elam to check date availability at Wampee for the end of September.

SCVRA MEETING FEEDBACK:

Chairman Lowder stated the SCVRA Conference was outstanding this year and all of the feedback he had received had been positive. He then asked Ms. Debra Moses, Assistant Commissioner, to give her report. Ms. Moses stated that 257 surveys had been sent out to employees for their feedback on the conference. She reported that as this date, we had received responses to 55 percent of the surveys. She stated overall the comments were very positive, noting the highlights of the comments. She then reviewed some of the negative comments received along with suggestions for next year's conference. The Commissioner reported that Ms. Moses was responsible for the conference program and Ms. Joanie Hess was responsible for the logistics and that they were a dynamic team and did a great job. Mr. Rick Elam stated that SCVRA made money this year on the conference, which was great news. Mr. Joey Thomas asked about the comments received from vendors. Ms. Moses reported that Mr. Shorter would send out formal surveys but feedback so far was positive. The Exhibitors stated the contacts made were good, quality ones, and they liked not having to initial cards for door prizes as in the past. Mr. Lowder thanked Ms. Moses and Ms. Hess for their "team" effort and for a great job.

REHAB ISSUES INSTITUTE – LEADERSHIP FEEDBACK:

Ms. Barbara Hollis, Assistant Commissioner, stated this Rehab Issues Institute was held on February 27 and 28, 2007. The training was developed for the Area and Comprehensive Supervisors and it covered the Nine Standards of Excellence. She noted that an agenda of the Institute was in their packet and then reviewed its contents. She explained the purpose of the training was to provide the “why” for each of the Nine Standards and “how” to lead and achieve each standard. She further noted that there are many new supervisors so this was an in-depth training on the “basics” and it served as a reminder for seasoned staff. Ms. Hollis reported that each participant was given a Resource Manual to take with them and that it contained all supporting information of the Institute along with articles on leadership.

Ms. Hollis stated the feedback from the supervisors regarding the Institute was extremely positive, thanks to the hard work and organization of committee members. This Institute was professional, timely, and relevant. The one request was to change “working lunches” into a lunch break so they would have time to network with their peers. Ms. Hollis stated that many supervisors presented and did an outstanding job with great energy and commitment. Chairman Lowder commented it was “a great agenda” with a lot of material to cover. The Commissioner briefed the Board on who presented in the areas of Community Relationships, Legislative Contacts, and Business Partners. Ms. Hollis announced that a version of this training will be held for State Office staff on May 21, 2007.

FOCUS GROUPS:

Ms. Hollis stated that Focus Groups were developed at the request of Mr. Bryant. Ms. Hollis stated the purpose of the Focus Groups was to talk about issues surrounding the employee’s job duties and to develop better ways to perform them with the focus being on improved client service delivery. To date, she stated 15 Focus Groups had been developed and then named the groups. Ms. Hollis reviewed the process and guidelines given to the Focus Groups. She stated the end result is a formal report of recommendations with the participants’ signatures included. She added this gives them a sense of ownership, and this process has worked well. She reported that the focus groups have led to some changes in policy, job duties, classification, training, and improved

service delivery to our clients. The Commissioner stated this is a piece of our internal customer service program, and some of their recommendations had resulted in the Agency's saving money. Dr. Breland asked what some of the recommendations were, and Ms. Hollis reviewed a few examples.

LEGISLATIVE UPDATE:

Mr. Mark Wade, Director of Public Information, began his presentation by stating the Legislative Breakfast was held on March 1, with 94 contacts being made. He noted this was very timely as it was held the day after Rick Quinn's presentation on Legislative Contacts to the Area Supervisors at the Rehab Issues Institute.

Mr. Wade reported the Lyman News Conference was a great success. He stated it was held at City Hall with Dr. Roxzanne Breland, Representative Mahaffey, Senator Hawkins, and the Mayor of Lyman being present. The event was covered by WSPA – TV Channel 7 and the local newspaper.

Mr. Wade reported the two items requested in the Appropriations Bill have been passed in the House. The Agency requested \$500,000 recurring funds for School-to-Work Transition services and \$1.5 million one-time capital request for construction of the Lyman VR Center. He reported the Senate budget hearings are underway. The Commissioner presented the Agency's budget on March 14, asking for support of the House version of the budget. Mr. Wade stated the Joint Bond Review Committee and the South Carolina Budget and Control Board met back in January and approved the request to use the federal portion of Lyman funding to begin the plans for construction.

Mr. Wade updated the Board on the restructuring bills adding that there is really no news to report as the bills introduced by Senator McConnell and Representative Doug Smith have no subcommittees appointed to them. He stated a Department of Administration Bill was introduced last week by Representative Garry Smith. This restructuring bill focuses on the Budget and Control Board and does not involve the Agency.

Mr. Wade announced that a Joint Resolution was sponsored by Representative James Smith to establish a study committee to develop a statewide service delivery system for persons with epilepsy. The committee would include representatives from many agencies, and Vocational Rehabilitation would have a seat on this committee. He stated the House passed this bill and sent it to the Senate. It has now been referred to the Medical Affairs Committee.

Mr. Wade stated this next bill involves appointees to State Agency Boards, such as ours. This bill is sponsored by Senators Bill Mescher and Jake Knotts. It would require the Governor to appoint or reappoint officeholders by December 31st of the year in which their terms expire. Incumbent officeholders would retain their positions until the appointment and/or reappointment is confirmed by the Senate. This bill has been assigned to a Senate Judiciary Subcommittee consisting of Senator's Moore, Ford, Ranking, Mescher, and Scott.

Mr. Wade stated that Senator Greg Ryberg has introduced two bills: one to change state retirement from 28 years to 30 years and the other to abolish the TERI program.

Mr. Wade reported that another bill of interest is one that would reform the Workers Compensation Law and is expected to dissolve the Second Injury Fund. Dr. Breland asked how this would affect the Agency, and Mr. Wade gave a few scenarios. Mr. Thomas stated he did not think the bill would pass and gave his reasons with a brief discussion following.

Chairman Lowder asked if an Architectural Review Committee has been formed for the Lyman building. Mr. Elam stated it had and that ten proposals have been received. These will be narrowed down to five and after interviewing these five, a selection will be made.

ADVISORY BOARD ACCOUNTS:

Mr. Rick Elam, Assistant Commissioner, stated that the Advisory Board Accounts have now been reviewed. The purpose and Agency procedures for interacting with these accounts will be established and defined. A manual is in the process of being completed and will be distributed by April 17, 2007 for Fiscal Specialists. The Commissioner stated these changes will give more consistency in these types of

accounts across the state. Mr. Elam announced Allied Opportunities which is a 501(c)(3) can serve as a resource for financial activities for those accounts that do not have the 501(c)(3) status. Dr. Breland asked what the funds in the Advisory Board Accounts were used for, and Mr. Elam stated the expenditures are for client activities. Dr. Breland asked about the Advisory Board Account in Greenville, and Mr. Elam responded that it was inactive.

MISCELLANEOUS:

Chairman Lowder announced the next Board Meeting will be held Wednesday, June 6, 2007.

SAFETY AUDITS:

Chairman Lowder welcomed Neil Lown, Safety and Risk Management Specialist, who is filling in today for Jeb Batten. Mr. Lown called attention to the handout titled Worker's Comp Injuries in their packet. He then gave a brief overview of the Agency's Safety Program and reviewed the graph in detail. The graph charted client and employee injuries noting the steady decline since the Safety Program was implemented. Mr. Lown stated that he is available to any facility and/or office of the Agency on demand to conduct safety training for employees. He also announced that each facility now has a Safety Coordinator to serve as the focal point for the facility's safety program, and he then reviewed the training they receive.

Mr. Lown reported that until the past six months, slips, trips, and falls were our leading causes of injuries. Now, within the past six months, there was a rash of injury reports involving lacerations. He gave examples of the injuries and stated that specific training was done in the areas where injuries were most frequently occurring.

Mr. Lown stated that all locations within the Agency, which total 68, have a Safety Assessment completed each year. The Commissioner stated that Mr. Lown does a good job and his assessments are very detailed. Dr. Breland asked if new Centers were checked before or after opening, and Mr. Bryant stated they are assessed before opening. Mr. Lown added that he works on the "front-end" with Wes Stokes, the Agency's architect.

INTERNAL AUDITS:

Mr. Bryant introduced Mr. John Sandifer, Acting Audits Manager, to the Agency Board, giving his work history with the Agency. Mr. Sandifer stated a handout was available in their packet regarding Internal Audits. Mr. Sandifer then went through his handout giving a brief description of each topic beginning with the Internal Audits mission. He detailed what was reviewed in production audits and program evaluations/reviews. Mr. Sandifer stated the audits are processed and routed within 30 days and recipients are given the opportunity to correct any findings. He added if there are any reoccurring findings in the audit, it is noted in the report. He stated that "Special Audits" are performed when there is an area of concern.

Mr. Sandifer reported that Internal Audits was also responsible for Equipment Inventories, and they are completed annually in all offices within the Agency. Brief discussion followed regarding items and equipment inventoried.

Chairman Lowder reported that the last state audit was completed on June 30, 2005, with a few repeat violations that we need to address. He added that when you receive the final report a year and a half later it is too late to respond by the next audit. Dr. Breland asked if we worked off the preliminary findings report, and the Commissioner responded that is what we do.

BUDGET UPDATE:

Mr. Rick Elam also gave the budget update, presenting graphs outlining the Agency's expenditures for State Fiscal Year 2007. He reported the total Agency Budget for the Fiscal Year is \$117,297,088. As of February 28, 2007, with 67 percent of the year completed, \$72,785,207 (62%) has been authorized, and \$57,258,301 (57%) has been paid. The Total budget for the Administrative and Basic Services Program is \$59,550,493; \$39,301,854 (66%) has been authorized, and \$34,945,028 (59%) has been paid. The total budget for Case Service Expenditures is \$8,201,270. \$4,790,212 (58%) has been authorized and \$3,634,312 (44%) has been paid. Dr. Breland asked why there was a lag in case service expenditures, and the Commissioner stated it could be a result of cost savings of centralization. He stated that an analysis

will be completed to see where the savings are and if they are in the right places.

Mr. Elam reported on Capital Projects, stating that during the current fiscal year nine new projects have been established and one current project had additional funds added. The total amount of dedicated funds is approximately 3.6 million for these ten projects. At the request of Chairman Lowder, a brief summary was then presented on the status of all current projects. Mr. Thomas asked how many more "store fronts" need to be remodeled, and Mr. Elam stated about a half of the offices remain. The Commissioner stated that we are in Phase II in the refurbishing process of the Muscular Development Center.

CASE SERVICE STATISTICS:

Ms. Linda Lieser, Director of Case Services, presented the graphs outlining the figures ending February 28, 2007. She stated the referrals were at 12,318 and the IPE's were also doing well with 8,655 plans. Ms. Lieser stated that we are not doing as well as we would like with closures. She stated there are a 100 days left in the fiscal year and everyone is working hard to meet the goal. Ms. Lieser stated we have successfully closed 5,363. The reasons for the increase in Referrals and IPE's were discussed.

TRAINING CENTER MID-YEAR REPORT:

Mr. Bob Oppermann, Director of Field Operations, began his presentation by stating that in our Centers we provide one of our most important services, Job Readiness Training. Its importance lies in the fact that it is where we fulfill a part of our mission which speaks about preparing for employment. He stated we have a standard for the Training Centers, and we refer to it as Balance in the Training Centers, noting it is one of the nine Standards of Excellence. The Balance is defined by work, clients, and direct placement into jobs. Mr. Oppermann stated that the Agency uses the Productivity Rate as a tool to measure the productivity of a Training Center. He then reviewed the figures that are used in determining the Productivity Rate. Mr. Oppermann stated that we have improved in all categories this year and are ahead on goals. He then briefly reviewed some of the Training Centers and contracts. Mr. Oppermann noted that out of 24 Training

Center Managers, that 12 have 20 months or less of experience in their current role.

Mr. Oppermann asked the Board Members to review the map of the state located in their packets. This handout maps out the Business Development Specialists and the territory they cover. He reviewed the correlation between expansion of Business Development Specialists and growth in our Training Centers. He also briefly reviewed the role of the Business Development Specialists. Ms. Presha asked how the Centers are performing with the 12 new managers and Mr. Oppermann stated that overall they are doing well and that there are three Centers that are not doing as well as the others. He reported that strategy sessions had been held with these and that we are beginning to see growth.

The Commissioner announced that Senator Lindsey Graham toured the North American Rescue and Products contract located on Pelham Road in Greenville, as he is very interested in this contract. Chairman Lowder asked about Walgreens, and Mr. Oppermann responded that they have hired 30 of our clients with two already having resulted in successful closures. Mr. Bryant stated that the grand opening for Walgreens would be held on June 14, 2007, and they all would be invited to attend.

Meeting Adjourned

Completed 3/22/07

AGENCY BOARD MEETING

South Carolina Vocational Rehabilitation Department

June 25, 2008



Welcome & Introduction	Chairman Lowder
Approval of Minutes.....	Chairman Lowder
DDS Update	Shirley Jarrett
Legislative Update	Mark Wade
Recruitment Project	Debra Moses
SWAT & Telework Training Update	Anne Iriel
Transition Services Update	Anne Iriel
Allied Opportunities Update.....	Tim Russell
Building Update	Rick Elam
Financial Updates – Budget & Audits	Rick Elam
Case Service Statistics	Linda Lieser
MDC Open House – July 8th.....	Rhonda Pitts
Closing Remarks	Chairman Lowder

MINUTES
Agency Board Meeting
June 25, 2008

Present: Derle A. Lowder, Sr., Chairman
H. L. Laffitte, M.D., Vice-Chairman
Roxzanne Breland, D.C., Board Member
Alease Samuels, Board Member
Joseph Thomas, Board Member

Staff: Rick Elam, Assistant Commissioner
Anne Iriel, Director of Program Development
Shirley Jarrett, Assistant Director of DDS
Linda Lieser, Assistant Commissioner
Debra Moses, Program Manager
Rhonda Pitts, Area Development Director
Tim Russell, Administrative Manager
Mark Wade, Assistant Commissioner

WELCOME:

Chairman Lowder called the meeting to order, welcoming everyone to the meeting including Marge Butler of the Client Assistance Program in the Governor's Office and thanked her for the packets of information she had brought. Chairman Lowder asked Mr. Larry Bryant to open the meeting with the invocation. He then thanked everyone for their thoughts and prayers during his wife's recent surgery. Chairman Lowder stated the dates for the Board Meeting at Wampee will be September 23-25, 2008. He added that Wampee has a new facility they recently built where the older home was located and he stated it was a "big improvement." Mr. Bryant informed the Board that Ms. Barbara Hollis had heart surgery on Monday, June 23, at Wake Forest University Hospital, and understands from her family that she is doing well. He added that Houston Matthews' wife had surgery for melanoma in Pittsburgh and is recovering. Mr. Bryant asked to keep them all in their thoughts.

APPROVAL OF MINUTES:

The minutes from the last board meeting were reviewed. Dr. Roxzanne

Breland made a motion the minutes be accepted as written, and Mr. Joey Thomas made the second motion. The Board voted unanimously to approve the minutes as written.

DDS Update:

Ms. Shirley Jarrett stated that Mr. Tom Paige was in Atlanta this week and she would be reporting in his absence. She gave the Board an outline of allowance rates, along with a perspective on the State, Regional, and National level of Disability Determination Services (DDS). Ms. Jarrett stated that Mr. Michael Astrue, Commissioner for the Social Security Administration, is very claimant centered and wants the correct decision to be made at the earliest point in the process. She added that this results in reducing appeal backlogs and better customer service. She then went over the recent and future initiatives that have been put into place to accomplish this goal. Ms. Jarrett reported that the Atlanta Region which the South Carolina DDS program is under is the largest of the ten regions. Dr. Breland asked which eight states were included in the Atlanta Region and Ms. Jarrett responded by naming the states. Ms. Jarrett reported that a Decisional Accuracy Workgroup for the Atlanta Region has been formed and gave the explanation of why it was created and what it involved. She briefly reviewed the Special Reconsideration Review and explained the details of this review along with the results. Ms. Jarrett stated that Request for Policy Consult Process has now been put in place as its purpose is to align the decision making process for all regions. She briefly reviewed the details of the process and stated it is bringing good results. Ms. Jarrett reviewed the statistics of the allowance rates for this Federal Fiscal Year along with the Reconsideration Level percentages. Dr. Breland asked Ms. Jarrett to explain why there are differences in these levels. She responded that it is based on the socio-economic factors and gave a brief overview of why this factor affected these figures. Mr. Bryant added that the state of South Carolina has more recipients receiving disability and is the seventh highest in the nation for denying disability which shows the socio-economic factors. Ms. Jarrett closed by sharing that Mr. Paige found out as of Friday, June 20, that the SSA Commissioner is going forward with the analysis phase of the Information Technology Single System approach for the disability

process. Ms. Jarrett than gave a brief explanation of the “Single System” adding that Mr. Paige has been very instrumental in implementing this program.

LEGISLATIVE UPDATE:

Chairman Lowder asked Mr. Wade if we lost any supporters of the Agency during the re-election process and Mr. Wade named a few that had not been re-elected adding that Representative Breeland retired. Mr. Wade reported that the budget for the state Fiscal Year 2008-2009 was finalized with the legislature overriding the majority of Governor Sanford’s vetoes. He added that it was a lean year for the budget and stated that most agencies received a 2.5 to 5 percent cut. Vocational Rehabilitation’s base cut resulted in a 2.1 percent loss. However, the Agency did receive a one-time allotment of \$250,000 for transportation services. Mr. Wade stated that the House originally passed some capital improvement projects for the Agency but they were later cut in the Senate due to the lack of funds. He announced that employees will receive a one percent increase with no increase in health insurance premiums. Retirees will get a two percent cost of living increase. Mr. Wade then reviewed other legislation that took place during this past session. He stated that a proviso was authorized to Vocational Rehabilitation and six other state agencies to offer bonuses when recruiting health care workers. Mr. Wade announced that there were no significant restructuring bills passed and gave a review of the few that were introduced. There was another piece of legislation named the Government Accountability Act that came extremely close to passing. Mr. Wade gave the details of what this included and how it would affect state agencies.

Mr. Wade reported that on the federal level that the reauthorization of the Workforce Investment Act, which includes the Rehabilitation Act, continues to be stalled. He added that like many bills, it is probably on hold until after the fall elections. Mr. Wade stated there was no news on the federal Appropriation Act either. He reported that the Council of State Administrators for Vocational Rehabilitation (CSAVR) has recommended that the public Vocational Rehabilitation Program receive \$200 million dollars in additional funding beyond the cost-of-

living increase. He then reviewed how the money would be divided between school-to-work transition services and for veterans incurring disabilities in Iraq and Afghanistan.

RECRUITMENT PROJECT:

Ms. Debra Moses gave a brief history on recruitment initiative in order to hire quality Vocational Rehabilitation professionals. She explained that her new role in the Agency was to take a more aggressive approach in these efforts. Ms. Moses stated that she will be visiting colleges and universities throughout the state while also educating students about our Agency. She explained that the Agency has a paid internship program. Dr. Breland asked how many internship positions we had and Mr. Bryant responded that it was approved for one per office throughout the state. Ms. Moses explained that in some cases it resulted in two to three if the offices had vacancies. She stated that only two programs in the state offer master's degrees in Rehabilitation Counseling. Mr. Thomas asked which ones these were and Ms. Moses responded, University of South Carolina and South Carolina State University. Ms. Moses reported that she will be partnering with the local Area Supervisors so the colleges and universities will be familiar with who is in their area. Dr. Breland asked if she plans to visit private colleges such as Furman and Wofford, and Ms. Moses stated she had them on her list. Mr. Bryant added that Ms. Moses will also be recruiting for the bachelor programs for certain VR positions.

SWAT & TELEWORK TRAINING UPDATE::

Ms. Anne Iriel stated she wanted to update the Board on the Skilled Workforce Apprentice Training better known as SWAT. Ms. Iriel explained that SWAT is a partnership with employers to provide on-site training opportunities for our clients. She stated that Darline Graham has worked very hard in getting this program started and gave a brief summation of her recruiting efforts. Ms. Iriel then named the companies in the Midlands area that we have had success with, giving details of each one. Dr. Breland asked what type of positions SWAT has placed clients in and Ms. Iriel gave her a few examples such as electrician and pharmacy technician. Mr. Bryant elaborated on the significant training benefits of the SWAT program. Ms. Iriel then

reviewed the plans for expansion of SWAT in Greenville, Marlboro, and Rock Hill. Ms. Iriel stated that in the coming year the Agency will be working on developing a roll-out schedule for the remainder of the state. Mr. Thomas asked if the Walgreens Distribution Center was running at full capacity, and Ms. Iriel responded that it would be within this year. Dr. Breland and Mr. Bryant encouraged Mr. Thomas to visit the Distribution Center. Mr. Thomas asked how many clients that Walgreens has hired and Mr. Wade responded fifty full-time employees. Dr. Breland asked if they still assisted with transportation and the response was yes.

Ms. Iriel announced that the telework program with Time Warner Cable was now in place. She gave an overview of telework, which is home based employment for the significantly disabled. Ms. Iriel reported that the training is taking place in the Model Home on campus. Cathy Russell of the Information Technology Training Program was trained by Time Warner and is the trainer for this program. The position that we are providing training for is the Customer Verification Representative. She added that we have a client in place being trained in the Model Home. Ms. Iriel stated the client should be officially hired by Time Warner Cable upon successful completion of the training. She stated that the training was going well and the client was progressing. Mr. Thomas asked if the opportunity for home based employment had been explored with Santee Cooper. Mr. Iriel responded that currently they do not have this type of position. Dr. Breland suggested that we educate the other state agencies of the availability of VR clients as document scanners.

TRANSITION S SERVICES UPDATE:

Ms. Iriel stated that the Agency has experienced a great deal of success with High School/High Tech (HS/HT) in the schools. She gave a brief overview of HS/HT and a brief update on Transition Services. She stated that we are looking at how we can reach more students, adding that we are beginning to work with students at the end of their sophomore year instead of waiting until their junior year. Ms. Iriel gave a synopsis of the Agency's partnership with the schools and gave examples. She then reviewed the expansion of HS/HT and the schools

the Agency currently has agreements with. Ms. Iriel announced that the Youth Employment Services (YES) Grant was up and running and that Kerry Mandeville is overseeing this grant. She stated the grant is in place at Strom Thurmond High School and Lancaster High School. There are plans to expand in the Beaufort, Laurens, and Greenwood areas in the next two years. Dr. Breland asked what “concrete opportunities” these students would have at the completion of high school and Ms. Iriel responded giving a few examples with a brief discussion following. Mr. Bryant asked Ms. Iriel to give a brief summary of Mr. Bailey. Ms. Iriel explained that Mr. Bailey is the father of a disabled son and briefly shared his story. She stated that Mr. Bailey conducted research around the nation as he wanted further training provided beyond high school for students with disabilities. Currently, he has been able to market his plan at Clemson University and the University of South Carolina and she gave a brief overview of the two year program. Ms. Iriel stated that the Agency will partner with these universities as this a great opportunity for youths with disabilities in South Carolina. Dr. Breland asked where they would live if attending Clemson University and she gave the details of the campus setting.

Mr. Thomas asked if HS/HT was in Horry County and Ms. Iriel replied that it was at Conway High School. Mr. Wade stated that the Conway school district has begun to produce a video about VR services for students. Mr. Thomas stated that he had been asked to speak at a Conway City Council meeting regarding funds for an adult day care facility. Mr. Bryant asked Ms. Iriel to follow-up with Mr. Thomas to see if we can offer any assistance.

Ms. Iriel then reviewed several initiatives the Agency is currently working on and where the Transition Services will be expanding. Dr. Breland asked if we were working with the Department of Corrections. Ms. Iriel stated that the Agency is “revisiting” this population. She also added that the Agency has Counselors who serve the correctional facilities. Mr. Thomas suggested that the Agency contact the Christopher Reeve Foundation. Ms. Iriel stated that several years ago that Mr. Reeve actually visited the campus and agreed it was time to

renew the contact with the Foundation. Mr. Thomas also suggested the Agency contact neurosurgeons to educate them about the Vocational Rehabilitation Department. He then shared his personal story regarding an incident with a neurosurgeon.

ALLIE D OPPORTUNITIES UPDATE:

Chairman Lowder welcomed Mr. Tim Russell to the Agency Board Meeting adding that this is the first time that Mr. Russell has addressed the Board. Mr. Russell thanked the Board for the opportunity of being there and began his presentation by stating “it was great to be a part of an Agency who was always looking to the future and that Allied Opportunity is a great example of this.” He gave a brief summary of Allied Opportunities stating that it is a public benefit corporation designed to provide education, employment, training, and rehabilitation opportunities for people of all ages, abilities and walks of life. He addressed the need for Allied Opportunities and gave a synopsis of the future vision and expansion plans. Mr. Russell also included how beneficial this program is to Vocational Rehabilitation and gave examples. Mr. Russell reported that Allied Opportunities has currently hired two clients and has partnered with the Marlboro Training Center. He stated that eighteen current clients have been identified as potential employees for Allied Opportunities, and they are in five different locations. Mr. Russell gave an overview of future plans giving examples of contract work with such companies as Freightliner, NISH, etc. He added a few examples of future growth potential. Mr. Thomas asked how Allied Opportunities is funded. Mr. Russell responded that Allied Opportunities initially began with funds from a grant to start and then explained the rest of the budget process as it is self-supporting. Mr. Bryant stated this has been a complicated process with many details to work out and that Mr. Russell has done an “outstanding” job. Dr. Breland asked if the clients of Allied Opportunities had health insurance and he responded they had Workers Compensation. Mr. Bryant stated that as Allied Opportunities expands, additional benefits will be explored. Chairman Lowder asked if the Agency could close these cases in status 26. Mr. Bryant responded yes and gave an explanation using NISH as an example. Ms. Marge Butler asked if Allied Opportunities would hire clients with

felony charges as this is a large population. Mr. Russell responded that this is being reviewed as we would want to place this population in the appropriate position such as a truck driver and not a position that would impede the rehabilitation process of others.

BUILDING UPDATE:

Mr. Rick Elam stated that it has been a very active year in the building area. He stated that at the meeting held last September at Wampee there were over sixteen projects with none being in the construction phase. He reported that now eleven of them are in the construction phase and then followed with a brief summary. Mr. Elam stated that the Lyman Center will go out for bid July 16, and he hopes to “break ground” early fall. Dr. Breland asked how “green” the new center was going to be and he gave a synopsis of what the architects had suggested. He added there was a lot of natural light incorporated into the building but that some of the other “green” initiatives were not feasible. Mr. Elam then gave a brief review of the other projects going on statewide. Chairman Lowder asked where the Agency was with the security system installations. Mr. Elam responded that nine are in the final stages of Phase I. Mr. Thomas asked how many phases there were, and Mr. Elam responded there were two. A brief discussion followed giving the details of the remaining offices for the security system.

FINANCIAL UPDATES – BUDGET & AUDITS:

Chairman Lowder asked Mr. Elam to update the Board on the budget. Mr. Elam asked the Board to please see the charts located in their packets. Mr. Elam then reviewed the graphs reporting the total Agency Budget for the Fiscal Year is \$127,460,106. As of June 16, 2008, with 96 percent of the year completed, \$112,145,853 (88%) has been authorized, and \$109,210,947 (86%) has been paid. The total budget for the Administrative and Basic Services Program is \$69,162,874; \$62,498,389 (90%) has been authorized, and \$60,172,783 (87%) has been paid. The total budget for Case Service Expenditures is \$9,000,000. \$8,213,780 (91%) has been authorized and \$6,879,374 (76%) has been paid. Mr. Elam stated this is due to the delay in receiving doctor and hospital bills. Chairman Lowder asked if we were coming in at ten percent under budget and Mr. Elam stated that percentage would be closer to

budget when the year closed. Mr. Thomas asked if the gas prices were affecting the budget. Mr. Elam stated that it had been affecting the van routes and that they were being monitored to make sure they remain cost effective.

Mr. Elam stated the last audit results were completed and three errors were found. He reviewed each error giving explanation that two were personal errors and one was a programmatic error on the server with a brief discussion following.

Mr. Lowder took this opportunity to ask Mr. Wade where the Agency is in the Baldrige process. Mr. Wade responded that we have been selected for a site visit which is tentatively scheduled for the first week in August. Mr. Wade further explained that usually four to five examiners come and stay for two or three days. He added that he is in hopes of having the results of the site visit by the end of September. Mr. Thomas asked if they visit State Office or Area Offices, and Mr. Wade responded they visited both giving a brief synopsis of what they had done in the past.

CASE SERVICE STATISTICS:

Ms. Linda Lieser asked the Board Members to review the handouts located in their packets. She stated this would be a "short and sweet" presentation as the Agency was doing very well. She then reviewed the statistics for referrals, IPE's, and 26 closures. Ms. Lieser added that we were four thousand over goal in Referrals and two thousand over goal in IPE's. Ms. Lieser stated that there are four days left in the current fiscal year and the 26 Closure goal will be achieved. She added that Information Technology will have staff here until midnight on June 30, in order to ensure that all cases for this fiscal year will be counted.

MDC OPEN HOUSE – JULY 8:

Ms. Rhonda Pitts announced that the Open House will be on July 8, from 10:00 a.m. to 3:00 p.m. She stated that the invitations have been mailed out and reviewed the targeted audience that the Agency had invited. She then gave in detail a description of what all would take place the day of the Open House and that the tour would end with

refreshments being served at the Human Resource Development Center. Mr. Thomas asked if we had invited anyone from Atlanta or border towns such as North Augusta and Charlotte. Ms. Pitts stated they had only included South Carolina participants, including North Augusta, but will look at Augusta and Charlotte. Mr. Bryant invited the Board to please join us that day if their schedule permitted them to attend.

CLOSING REMARKS:

Ms. Butler reported that the Governor's Committee will be meeting again bringing in all active Chairpersons to share with those who want to start chapters in their areas. She stated the Governor's Committee Luncheon that was held here at the Human Resource Development Center was a great success. Ms. Butler hopes that next year will be large enough to have the function at a hotel and mentioned a few ways the luncheon could be funded.

Mr. Bryant thanked the Board for their phone calls and cards sent after the loss of his father-in-law and thanked Dr. Breland for attending the funeral.

Chairman Lowder again reviewed the dates for the Board meeting in Wampee which are September 23-25, 2008, and that the December Board meeting will be held December 3, 2008.

Meeting Adjourned

Completed 6/26/2008

Appendix - D

MINUTES OF MEETING OF BOARD OF DIRECTORS
OF
ALLIED OPPORTUNITIES, INC.
December 7, 2011

At a call of a majority of the directors with proper notice having been given, a meeting of Allied Opportunities, Inc. (AO) was held on December 7, 2011 at 1410 Boston Avenue, West Columbia, SC.

Board members Emmett Tolson and Tim Russell were in attendance. Also in attendance was Preston Coleman and Leslie Shipp. Unable to attend: Vicki Bowles.

Mr. Russell and Mr. Coleman reported to the Board to include the following:

- NISH: Allied has successfully hired (5) DOJ employees and all are doing well. Two have had slight issues (1) with grooming habits and (1) with know-it-all attitude but DOJ is working through them with success. Unnecessary for Allied to intervene at this point.
- Motion was made by Tim Russell to approve the minutes of 8/4/11 and Emmett Tolson second.
- AO executed a Memorandum of Agreement (MOA) with SCVRD for Allied to operate both loan programs. Effective Date: 06/01/10 -05/31/13
 - Need to diversify funds with SCSCU.
 - Need to update The Foundation signature card with SC SCU – Mr. Coleman lead the discussion on the purpose of The foundation and how the Assistive Technology and Telework grants were given, why the funds are still in The Foundation name, although AO is managing and facilitating the day-to-day operations of the loan programs, and the legal issues surrounding the transfer of the custodian from one CRP to another.
- Discussed day-to-day operations, present status and future plans
 - Discussed changing the charge rate from 31% to 33%. It was decided 33% would be better.
 - Discussed hiring a person to manage the loan programs and use this person as a back-up for Allied. Currently working on a position description and searching for a person to fill this need. Rick Elam is currently interviewing for other SCVRD positions and looking out for a person that may fit the loan program's needs.
 - Tim Russell to investigate to see if SCANPO has a posting system on their website and if there are any other resources through them we may be able to tap into.
 - Discussed the need for AO to hire a replacement for the current administrative position and possibly invoice SCVRD for a portion of the time spent on payroll because the State Contract requires Allied to have this person on board to manage 10 or more employees.
 - Will possibly pro-rate the hours and invoice SCVRD to the VR hours and Allied will absorb the Allied hours.
 - Discussed the need for AO to have their own computer system and new version of QuickBooks – perhaps SCVRD could purchase for AO. Leslie to follow up with Rick Elam to see if he can release the 81 authorization to proceed.
- VA Proposal
 - May target January, 2012 as a target date.
 - The VA wants to resume the work adjustment evaluation relationship with SCVRD.
 - Backlog of people returning from overseas
 - Prefer AO to take the lead
 - WTC would keep records the VA needs as end product
 - AO would pay SCVRD on percentage basis
 - They would get paid for the work adjustment
 - AO would receive information from the VA and transmit information to WTC
 - AO would get the information back from the WTC, produce a report for the VA and then invoice SCVRD (1 cost) and VA (1 cost)
 - AO would front-fund the project to SCVRD
 - Non-client's working in the WTC

- Several retired or soon-to-be retired SCVRD employees may be interested in managing this project (Rachel Richardson, Tina Dillard, Richard Cain).
- Property for Sale
 - AO may purchase the property for sale at the rear of the SCVRD campus and build a building on the site, house AO and rent to SCVRD.
- Discussed the need for AO to have their own website and it was recommended AO speak with Jim Williams and the ITTC group to see if they have a student that could head up a project to create a brochure for AO and a website too.
- Copy of the NISH Best Practices Ethical Standards was given to TR and ET to review and approve. A copy will be sent to VB.

There being no further business to come before the meeting, a motion to adjourn was adopted.


Timothy Russell, Secretary/Treasurer

Allied Opportunities, Inc.
Board of Directors Meeting Minutes
January 19, 2012

At a call of a majority of the directors with proper notice having been given, a meeting of Allied Opportunities, Inc. was held on January 19, 2012 at 1410 Boston Avenue, in the Town of Springdale, County of Lexington, SC.

Board member Emmett Tolson, President, was not in attendance. Board members in attendance were Vicki Bowles, Vice President, and Tim Russell, Secretary/Treasurer. It was determined that in accordance with the Bylaws a quorum of the directors was present. Non-board members in attendance were Preston Coleman, Leslie Shipp, and Rick Elam.

This meeting was called to discuss and create a Statement of Purpose within the Purposes section of the Bylaws.

A Statement of Purpose was created and voted on. Tim Russell made the motion for Allied Opportunities to amend the Bylaws to correct miscellaneous scrivener's errors and by adding a Statement of Purpose provision to Section 1.02 Purposes as follows:

Statement of Purpose

Allied Opportunities is a non-profit, public benefit corporation designed to provide education, employment, training, and rehabilitation opportunities for people of all ages, abilities and walks of life with a focus on providing these services and opportunities for persons with disabilities.

Vicki Bowles seconded the motion. A vote being held, the motion passed unanimously.

There being no further business to come before the meeting, a motion to adjourn was adopted.


Timothy Russell, Secretary/Treasurer

Allied Opportunities, Inc.
Minutes Board of Directors Meeting
September 24, 2012

At a call of majority of the directors with proper notice having been given, a meeting of Allied Opportunities, Inc. (AO) was held on September 24, 2012 at 1410 Boston Ave. West Columbia, SC

Board Members Vicki Bowles, Emmett Tolson, Tim Russell, and Preston Coleman were in attendance.
Also in attendance was Rick Elam, Kristin Driggers, and Tiffany Hewett.

- Motion was made by Emmett Tolson to approve the minutes of December 7, 2011 and Vicki Bowles second.

Preston Coleman reported to the Board to include the following:

- Allied Financial Information
 - Current Allied BB&T Checking Balance \$ 155,735.08
 - Profit/Loss Statement
 - Balance Sheet
 - Current AT Loan Program Checking \$ 532,020.85
 - Current TW Loan Program Checking \$ 1,069,217.34
 - Current SCBT Orangeburg CD \$30,239.14
 - Current SCBT Orangeburg Checking \$ 3,343.83
 - Preston Moving Account to Avoid Monthly Service Fees
 - Another Signer Needs to be Added to Account
- Single MOA Approved by legal for Five Years with all SCVRD Training Centers
 - Changed Charge Rate to 32% for all SCVRD Training Centers
 - Exception Lexington Training Center at 31%
- Current Status: Allied
 - Number of Allied Employees: 50
 - Number of Training Centers: 14 and DOJ Columbia.
- NISH Renewed Allied/DOJ Agreement for Another Year
 - Health and Wellness Rate Raised from \$3.59 to \$3.71 Effective 10/01/12
- Motion was made to make a Payroll Company Change from Worklife to Paychex.
Minimum savings \$11,000 the first year and substantially more as the HR services are scaled back.
Motion was made by Vicky Bowles and seconded by Rick Elam.
- Reported that the Directors and Officers Insurance was increased to 2 million.
 - Vicki Bowles inquired if Allied had Umbrella Insurance.
- \$25.00 Gift Cards were Approved for all Allied Employees.
- VA has had 11 Participants to date. Lucerne Iseman Performing Evaluations
 - Allied Paid VR \$5,800 in advance for Participants Days in the VR Training Center
 - Allied Pays VR \$32.00 Per Day. Allied Tracks Days Used.
 - Vicky Bowles wants to see a VR tracking System of Days Put In Place .

Kristin Driggers Reported to the Board the following:

- Accident Protocol and Procedures Manual Reviewed
 - Designed to Help Center Managers
 - Assist with the New Hiring Procedure
 - 2012 Accidents Filed with WC - 5 Different Training Centers:
Rock Hill, Aiken, Greenville, Lexington, and Gaffney
- Drug Free Workplace Presentation put on CD for ease of training
 - Sent to all Center Managers
- Rick Elam and Vicky Bowles Discussed having VR Payments Direct Deposited into the Allied Checking Account.

Tim Russell Reported to the Board the following:

- Payroll Time Sheets
 - Tim Russell Automating Time Sheets from Training Centers to Allied
 - Allied Employees Time Cards Will Be Processed the Same as VR Clients
 - One Test Center in Operation (Hartsville)
- Plans to include Allied in the VR Decision Tree for Work Injuries in the future.
- Proposed Ordering Green Shirts for Allied Employees Seconded by Unanimous Vote.

Tiffany Hewett Reported to the Board the Following:

- Motion to approve/decline the Revised Loan Guarantee Approval Guidelines
 - - APPROVED by the Board
 - - Unanimous.
- Motion to approve/decline the Revised Hold Harmless Agreement
 - - APPROVE by the Board
 - - Unanimous
- Update on New Federal Grant submission for AT Loan Program
 - - Submitted and waiting for response from RESNA
- Discussion about revising the Loan Application Forms
 - - Tiffany Hewett will gather other site examples
 - - Tiffany Hewett will submit a draft for the Board's review at a later date.
- Further discussion about the development of the Advisory Board for the AFP's
 - - In process
- Update on the development of Direct Lending with the Loan Programs,
 - Other site examples referenced
 - Research findings relayed to the Board.
- Suggestion to change the name of the 'Telework/Self-Employment' Loan Program to better market the program with more relevance and recognition regarding how the loan program is used.
 - Tiffany Hewett will gather examples of Loan Program names from other sites throughout the country
 - All members will brainstorm possible names for review at later date.
- Update on partnering with Georgia's preferred lender for the AFP programs
 - - No change at this time.
- Update on State Credit Union adding Allied Opportunities, Inc. to their debt protection documents for all new guaranteed loans in order to create a repayment responsibility on defaulted loans between the approved applicants and Allied Opportunities, Inc. as the guarantor
 - - SCU has not made this revision
 - - SCU has not responded to the request for this additional protection for Allied.


Timothy Russell Secretary/Treasurer

Allied Opportunities, Inc.
Board of Directors Meeting Minutes
November 14, 2012

At a call of a majority of the directors with proper notice having been given, a meeting of Allied Opportunities, Inc. was held on November 14, 2012 at 1410 Boston Ave. in the town of Springdale, county of Lexington, SC

Board Members in Attendance: Preston Coleman, Emmett Tolson and Tim Russell

Board Member Vicki Bowles was not in attendance

Non- Board Members in Attendance: Rick Elam, Kristin Driggers and Tiffany Hewett

Approval of Minutes

- Tim Russell motioned to approve Minutes from September 24, 2012 and Emmett Tolson Second.

Financial Statements

- **Orangeburg Checking** Account Balance \$2,871.06
 - Moved Orangeburg Account to New Checking Without Fees at SCBT
 - Annual Savings of \$180.00
- **Orangeburg CD** Balance \$ 30,239.14 (Does not have updated interest charges)
- **Allied** Account Balance \$179,010.91
 - On-line Banking Set Up with BB&T
 - Direct Deposit was Requested with SC Treasurer's Office waiting on notification
- **Assistive Technology** SCBT Checking \$529,869.68
- **South Carolina Teleworks** SCBT Checking \$1,067,672.42

Old Business

- **Board Member Changes**
 - Tim Russell motioned to add Rick Elam to the Allied Board of Directors and Emmett Tolson seconded the motion. A vote being held, the motion passed unanimously.
 - Emmett Tolson rotated off the Allied Board of Directors.

Preston Coleman Reported on:

- **Allied Employees**
 - Christmas Gift Cards - Walmart
 - Supplemental Benefits Canceled. Looking into SCAMPO to get new coverage.
 - Current Allied Employees – 49.
- **Payroll**
 - Paychex Software and data has been entered. Start reporting to Paychex 11/19/2012.
 - Savings for 2013 will be \$16,022.95
 - Additional 20% Savings on all Drug Testing and Background Checks
 - Preston is researching Obama Care ramifications on employee numbers.

- **NISH**
 - Department of Justice: US Attorney General Office
 - Two Allied Employees were Terminated
 - Two New Hires in Progress.

VA Update

Kristin Driggers Reported On:

- **VA Program**
 - Three new participants (1) Florence (2) Conway
 - Spreadsheet Attached \$22,725 in receivables to date.

Investment Update

Rick Elam Reported On:

- **Portfolio presented to Allied from JP Turner & Company**
 - Suggested only working with institutions that had a AAA rating
 - Allied Loan Programs ability to invest in land purchase discussed. (see details)

Loan Program Update

Tiffany T. Hewett Reported:

- **Advisory Board and Loan Review Panel Update:**
 - Suggestions for Advisory Board – *Development delayed*
 - Replace Michael Graham on Loan Review Panel. (see details)
 - Investment Committee – Confirm appointed members, and appoint one new member. (see details)
- **Review Direct Lending Requirements/Examples (Consumer Finance Division information review):**
 - Waiting on Stuart Lee regarding start up fees and requirements. – *No update to report.*
 - Discuss preferred parameters for direct loans and applicant requirements. (see details)

New Business

- **Add Allied Opp Inc. to SCU's default obligation paperwork for borrowers, include in application.** (See Details)
- **Bank Partnerships:**
 - SCU Revised Lender Agreement. (see details)
 - List of potential bank partners (see details)
- **Telework/SE program name revision.** (see details)
- **Loan Program Revisions:**
 - Loan Applications – Approved by Loan Review Panel
 - Loan Program's Policies and Procedures – updates approved by Board of Directors based on Loan Approval Guidelines and LPM decision authority.
 - Operational Procedures for Loan Program Assistant – Approved by Program Director

- **Marketing/Advertising:**

- Allied Website – Tiffany Hewett will coordinate with Matt Dougherty and report back to the BOD for final approvals. (see details)
- SCU – create link to program details and applications – Tiffany T. Hewett following up
- Corrected SCATP's website and information - Completed
- In process of correcting V.R.'s links. (see details)
- In process of correcting RESNA Catalyst information – In process
- Permission to create a Facebook/LinkedIn website for Loan Programs and disclose contact information? (see details)
- Brochures and Marketing Material Update. (see details)

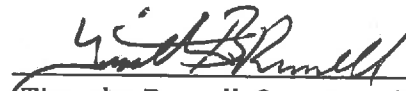
- **Investment Policy:**

- Initial Draft – using site examples of Georgia, Florida, Washington State, and RESNA's overall guidelines (Handout) (see details)
- Suggestions? (see details)

****Attachments****

- I. Details for Minutes
- II. Loan Applications (Revised 2012)
- III. Loan Approval Guidelines (Approved by BOD and Revised 2012)
- IV. Operational Procedures for Loan Program Assistant (Approved by Program Director & Revised 2012)
- V. Revised Lender Agreement
- VI. Revised Flow Chart reflecting all approved changes

There being no further business to come before the meeting, a motion to adjourn was adopted.



Timothy Russell, Secretary/Treasurer Signature

Allied Opportunities, Inc.
Board of Directors Meeting Minutes
September 24, 2013

At a call of a majority of the directors with proper notice having been given, a meeting of Allied Opportunities, Inc. was held on September 24, 2013 at 1410 Boston Ave. in the town of Springdale, county of Lexington, SC

Board members in Attendance: Vicki Bowles, Preston Coleman, Rick Elam and Tim Russell

Non-Board Members in Attendance: Kristin Driggers, Carmen Dwight, Tiffany Hewett and Denise Koon

Approval of Minutes

- Tim Russell motioned to approve Minutes from November 14, 2012 and Rick Elam Second.

Old Business

Kristin Driggers Reported on:

- Payroll change from Work Life to Paychex has been successful
- Website Update: Vista Print
 - A vote for approval being held, the motion passed unanimously
- Board Meeting Minutes were signed By the Secretary Treasurer
- Amended January 2012 Bylaws was approved and signed

New Business

Preston Coleman Reported on:

- **New Employee:** Carmen Dwight was hired as an Administrative Assistant for all three programs at Allied.
- **Hiring:** Allied is in the process of hiring new employees in various locations throughout the State. Two Department of Justice Allied employees were lost due to the Source America contract not being renewed.
- **Board Member Changes:**
 - Tim Russell motioned to appoint Denise Koon to the Allied Board of Directors and Rick Elam seconded the motion. A vote being held, the motion passed unanimously.

- Vicki Bowles rotated off the Allied Board of Directors
- **Land Purchase**
 - On September 24, 2013 the contract was signed to purchase fifteen acres of land behind South Carolina Vocational Rehabilitation Campus.
 - Preston Coleman made a motion to take a loan from the Workability Loan Program for said purchase. Three percent interest will be paid to the Workability Loan Program which will help with the programs sustainability, Rick Elam seconded the motion and the Board voted unanimously to approve.
 - Plans for a storage building on the new land was discussed. The storage building would be used by the Lexington Training Center. The possibility of including office space was also discussed.
- **Affordable Care Act**
 - Update given on new regulations and laws.

Financial Statements

- **BB&T – Allied Checking Account:** \$298,338.10
- **SCBT – Orangeburg CD Account:** \$30,960.96 (Maturity Date 9/21/2014)
- **SCBT – Orangeburg Checking Account:** \$2,511.06
- **SCU – AT Loan Program Balance:** \$518,538.27
- **SCU – WorkABILITY Loan Program Checking Balance:** \$1,036,636.53
- **SCU – Loans Program Business Checking Account:** \$1,328.98

Preston Coleman Reported on:

- **Veterans Administration Program Update:**
 - VA Program is a success. Allied had 40 VA Participants during the past year.
 - An income of \$54,000 has been generated with 22 successful cases closed and billed.
- **Allied Employment Update:**

Accomplishments:

- Exhibited at the SCVRA and AT Expo's
- Created Promotional Literature
 - New Marketing Material: (Tim Russell) designed the Tradeshow Banner, and (Kristin Driggers) designed the Trifold Brochures.
 - Website – Vista Print was approved unanimous by the Board.
- Electronic Procedures Manual E-mailed to all Center Managers
- New Policy Manuals Completed
 - All existing Allied employees received a copy as well as the Center Managers.

- Allied addressed Quarterly Center Managers Meeting on July 23rd, 2013
- The Injury Decision flowchart was submitted to VR

Kristin Driggers Reported on:

- Green Vests were reordered at the cost of \$903.75. The vest replacement policy was also discussed.
- Allied was setup on Direct Deposit
- Annual Drug Free Workplace Training in progress

Changes:

- Total Allied Employee Count: 51
 - Training Centers: (33)
 - Fort Jackson: (13) Source America Contract
 - DOJ: (2) Allied Employees will be retained through a SoleSource Contract. Original Contract was not renewed – Expired September 30th, 2013
- Profit for 01/01/13 – 06/30/13: \$66,108.94

Proposals:

- Preston Coleman proposed \$25.00 Walmart gift cards for employee Christmas gifts again this year. The Board voted unanimously to approve.

• **Loans Program Update:**

Financial Report:

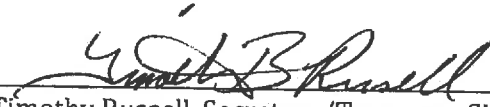
- Assistive Technology Loans Account Balance 09/24/2013: \$ 517,434.27
 - YTD Dividends Earned (AT): \$ 1,022.58
- Workability Loans Account Balance 09/24/2013: \$1,034,060.53
 - YTD Dividends Earned (WA): \$ 2,047.82
- Business Checking Account Balance 09/24/2013: \$ 1,328.98
 - YTD Dividends Earned (Business Checking): \$.54

Changes:

- New appointed Loan Panel Members
 - Todd Batt

Due to time constraints the Investment Fund Topic will be covered in the Investment Committee Meeting.

A motion to adjourn was given by Tim Russell at 2:33pm.


 Timothy Russell, Secretary/Treasurer Signature

Allied Opportunities, Inc.
Board of Directors Meeting Minutes
July 9, 2014

At a call of a majority of the directors with proper notice having been given, a meeting of Allied Opportunities, Inc. was held on July 9, 2014 at 1410 Boston Ave. in the town of Springdale, county of Lexington, SC.

Board Members in Attendance: Preston Coleman (Non-voting), Denise Koon and Tim Russell

Non-Board Members in Attendance: Vicki Bowles, Kristin Driggers, Carmen Dwight, Lucerne Iseman and Clayton Knight

Approval of Minutes

- Tim Russell motioned to approve Minutes from the Board of Directors Meeting September 24, 2013 and Denise Koon seconded the motion.

Board Member Changes

- Preston Coleman motioned to elect Wehman Sieling and Neal Getsinger to the Allied Board of Directors. Denise Koon seconded the motion.
- Tim Russell rotated off the Allied Board
- Officer Elections – Vice President and Secretary/Treasurer were discussed.

Old Business

Kristin Driggers Reported on:

- Payroll Change: On June 2, 2014 Allied removed the Human Resource Service from our package. Savings annually \$15,664.00.

Preston Coleman Reported on:

- Allied purchased 15 acres of land that borders SCVRD Campus on November 20, 2013 at the purchase price of \$427,500.00.
 - The Foundation contributed \$137,500.00
 - Lexington Training Center contributed \$50,000.00
 - Allied Opportunities, Inc. contributed \$106,378.43
 - Workability Loan Program gave Allied a \$136,050.00 Loan in which Allied is paying interest to help sustainability of the Program.

- YTD Interest paid \$2,239.20
- YTD Principle \$14,856.20
- Land Survey, Master Plan, and Storage Building Updates.

New Business

Kristin Driggers Reported on:

- New Employee Clayton Knight was hired as the Loans Program Manager in December 2013.
- Allied currently has 64 Employees in 16 Training Centers and the Department of Justice.
- Employee Summary Sheet was provided.
- Allied's Facebook Page was created in March 2014.
- Participated in a fundraiser with Midlands Gives on May 6, 2014. Tremendous exposure for the loan program and networking with other non-profits. First year for the program in this market, SCVRD involvement next year?

Preston Coleman Reported on:

- Workmen's Compensation Insurance: April 2014 Allied was not renewed by our carrier The Hartford. Allied is now insured by the State Accident Fund. One year premiums were paid up front \$26,358.00.
- General Liability Insurance was changed to Selective Insurance. Increased insurance coverage and lowered premium.

Kristin Driggers Reported on: Allied Financial Status

- Profit & Loss Statement January – June 2014
- BB&T – Allied Checking: \$305,647.51
- South State Bank (Formally SCBT) – Orangeburg Training Center Advisory Board
 - CD: \$30,960.96 (Maturity Date 9/21/2015)
 - Checking: \$2,511.06
- SCU – AT Loan Program Balance: \$509,738.27
- SCU – Workability Loan Program Checking Balance: \$891,082.02
- SCU – Club Checking Account Balance: \$5,256.94

Veterans Administrative Program Updates

Lucerne Iseman Reported on:

- Allied has had 10 VA Participants successfully complete the work evaluation in the first half of 2014.
- VA Data Report January – June 2014 Submitted.

- VA Billing: \$112,637.50
- VR Pre-Pay: \$22,320.00
- VR Days: \$17,484.00
- VA Payment: \$106,337.50

Loans Program Updates

Clayton Knight Reported on:

- Loan Inquiries – 32 Open Accounts at the State Credit Union that is guaranteeing \$390,000.00.
28% of our cash flow is being guaranteed to the State Credit Union for open loan accounts.
 - 61 Inquiries
 - 5 Approved
 - 8 Denied
 - 2 In Process
 - Denise Koon has TD Bank connections for the Loans Program.
- Web Address
 - www.alliedopportunitiesinc.net Website was shown to all Board Members.

Kristin Driggers Reported on Community Outreach with the:

- Assistive Technology Expo
- RESNA Conference – Washington, DC in July 2014
- Planning to be a Vendor at the SCVRA Conference in October 2014
- SCANPO Conference
 - Valuable training on Human Resource issues and Quickbooks training.

A motion to adjourn was given by Preston Coleman at 3:30pm.



**MINUTES
BOARD OF DIRECTORS MEETING
ALLIED OPPORTUNITIES, INC.
MARCH 30, 2015**

Board Members in Attendance: Preston Coleman (non-voting), Rick Elam, Neal Getsinger, Denise Koon, and Wehman Sieling

Non-Board Members in Attendance: Vicki Bowles, Kristin Driggers, Carmen Dwight, Karen Ferry, Lucerne Iseman, Clayton Knight, and Tim Russell

Call to Order:

At a call of a majority of the directors with proper notice having been given, a meeting of the Board of Directors of Allied Opportunities, Inc. was held on March 30, 2015 at 1410 Boston Avenue in the town of Springdale, county of Lexington, South Carolina. Preston Coleman called the meeting to order at 1:30 p.m.

Approval of Minutes:

Rick Elam made a motion that the minutes of the Board of Directors Meeting on July 9, 2014 be approved as presented. Denise Koon seconded the motion, and the minutes were unanimously approved.

Old Business:

- Preston reported that the Loan Program has been transferred back to the Foundation for Independence through Employment. A financial report for the Foundation was given by Clayton Knight, Loan Program Manager, at the Foundation for Independence through Employment's Board Meeting immediately following this meeting of Allied Opportunities, Inc.

New Business:

- Preston reviewed the Training Center Update, which shows where Allied employees are located throughout South Carolina. The Gaffney Training Center was transferred to the Foundation for Independence through Employment on September 22, 2014. The contract with Fort Jackson will end on May 31, 2015. The new company (Challenge Enterprise) plans to retain all existing employees.
- Preston next discussed the payroll listing of Allied employees as of March 18, 2015.

Success Stories:

- Success Stories were shared of employees who have successfully moved into positions with other companies outside Allied Opportunities. Particular recognition was given to Carmen Dwight, Allied's Administrative Assistant who was attending her last Board Meeting today. She begins a new job as a Customer Service Representative with the Social Security Administration effective April 20, 2015. Board members present commended Carmen for her service to Allied Opportunities.

Financial Information:

- Preston reviewed Allied's Profit and Loss Statement for January 2014 through December 2014 and answered questions as they came up.

Banking Information Year to Date:

- BB&T Checking: \$370,713.79

- South State Bank: (Orangeburg Training Center Advisory Board): \$1,835.48
- South State Bank CD: \$30,960.96 (Maturity Date 9/21/2015)
- Land Loan Balance: \$101,712.67
- Interest Paid to the Workability Loan Program to date: \$4,737.87

Land and Building Update:

- Preston discussed Allied's plans to build a 10,000-square-foot warehouse, which should be almost completed by the time the Board meets again in September 2015. He also reviewed the quotes submitted by Stewart Builders in Aiken, South Carolina and Weathers Contracting Company in West Columbia, South Carolina. Rick made a motion that we continue our efforts to build the storage building and rent it back to the S. C. Vocational Rehabilitation Department. Denise seconded the motion, and the motion unanimously carried.

Veterans Administration Program Update:

Lucerne Iseman reviewed the following program statistics. She suggested a telephone conference with Paul Knight and Preston to discuss participant tours.

- 31 participants entered the Allied VA Program and completed part or all of the program in 2014.
- 9 participants were entered into the VA Program but did not go through with the evaluation in 2014.
- 2014 Year-End Report:
 - VA Billing 2014 - \$88,230.00
 - Payroll Costs - \$13,798.88
 - Prepayments made to SCVRD - \$13,547.00
 - Administrative - \$10,100.00
 - Gross Profit - \$50,784.12
- Lucerne reviewed the VA Evaluation Day Tracker 2014 for non-Vocational Rehab clients.

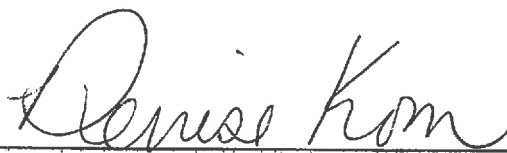
Outreach:

Kristin Driggers reported on the following activities:

- SCVRA Conference – Charleston 2014
- SCANPO Conference – Charleston 2015
- Assistive Technology Expo – March 26, 2015
- Facebook Page
- Web Site – www.alliedopportunities.com

Adjournment:

There being no further business to discuss, the meeting was adjourned by Preston Coleman .


 Denise Koon, Secretary/Treasurer

**MINUTES
BOARD OF DIRECTORS MEETING
ALLIED OPPORTUNITIES, INC.
SEPTEMBER 23, 2015**

Board Members in Attendance: Preston Coleman (non-voting), Rick Elam, Neal Getsinger, and Denise Koon

Non – Board Members in Attendance: Kristin Driggers, Clayton Knight

Call to Order:

At a call of majority of the directors with proper notice having been given, a meeting of the Board of the Directors of Allied Opportunities, Inc. was held on September 23, 2015 at 1410 Boston Avenue in the town of Springdale, county of Lexington, South Carolina. Preston Coleman called the meeting to order at 8:30 a.m.

Approval of Minutes:

Rick Elam made a motion that the minutes of the Board of Directors Meeting on March 30, 2015 be approved as presented. Denise Koon seconded the motion, and the minutes were unanimously approved.

New Business:

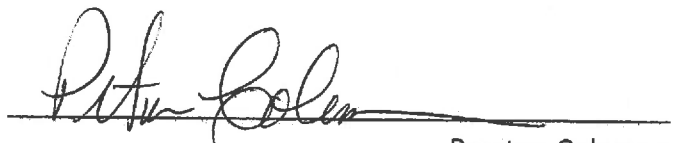
- Rick Elam motioned to elect Kerry Mandeville, Emmett Tolson, and Larry Oswald to the Allied Opportunities, Inc. Board of Directors. Neal Getsinger seconded the motion and the Board voted unanimously to approve.
- An update on the new Allied Opportunities, Inc. storage building was given by Preston Coleman

Board Member Changes:

- Rick Elam, Denise Koon and Neal Getsinger submitted their resignation from the Allied Board of Directors effective September 23, 2015. Resignation letters were submitted.

Adjournment:

There being no further business to discuss, the meeting was adjourned by Preston Coleman.


Preston Coleman

MINUTES
BOARD OF DIRECTORS MEETING
ALLIED OPPORTUNITIES, INC.
April 11, 2016

Board Members in Attendance: Preston Coleman (non-voting); Rick Elam (non-voting); Wehman Sieling and Emmett Tolson.

Non-Board Members in Attendance: Kristin Driggers; Lucerne Iseman; Clayton Knight and Melissa Watters.

Board Members Absent: Kerry Mandeville and Larry Oswald.

Call to Order:

At a call of a majority of the directors with proper notice having been given, a meeting of the Board of Directors of Allied Opportunities, Inc. was held on April 11, 2016 at 1410 Boston Avenue in the town of Springdale, County of Lexington, South Carolina. Preston Coleman called the meeting to order at 11:00 a.m.

Approval of Minutes:

Preston Coleman made a motion that the minutes from the Board of Directors Meeting on September 23, 2015 be approved as presented. Wehman Sieling seconded the motion and the minutes were unanimously approved.

Old Business:

- Preston introduced the new Board Member: Emmett Tolson.

New Business:

- Preston proposed the election of new officers. Emmett Tolson nominated and seconded the motion for Wehman Sieling as the President. Emmett Tolson nominated Larry Oswald for Vice President and Wehman Sieling seconded the motion. Emmett Tolson nominated Kerry Mandeville for Secretary/Treasurer and Wehman Sieling seconded the motion.
- Kristin Driggers reported on the Employment Program: 38 Allied employees in 14 SCVRD training centers and settings.

Success Stories:

- Success Stories were shared of employee(s) who have successfully moved into positions with other companies outside Allied Opportunities, Inc. Particular recognition was given to Earnest Townsend at the Charleston Training Center, who was hired directly by South Carolina Vocational Rehabilitation on February 1st of 2016. Preston also stated he encourages employees to seek better positions after they have built a stable work history with Allied Opportunities, Inc.

Financial Update:

- Preston reviewed Allied's Profit and Loss Statement for January 2015 through December 2015 and answered questions as they arose.
- Allied's income declined in 2015 due to loss of the Fort Jackson and Department of Justice, Source America contracts.

Banking Information Year to Date:

- BB&T Checking: \$168,327.96
- BB&T Savings: \$100,241.64
- South State Bank: (Orangeburg Training Center Advisory Board) \$1,367.87
- South State Bank CD (Orangeburg Training Center) \$31,131.33

Land and Building Update:

Preston discussed Allied's two outstanding loans with the Workability Program.

- Building Construction Payments to date: \$356,166.00
- Land Loan Balance: \$72,799.75
 - Interest paid to Workability Loan Program YTD: \$7,052.89
- Building Loan Balance: \$146,666.99
 - Interest paid to Workability Loan Program YTD: \$250.00
- Three Year Lease Agreement with SCVRD for the new storage building
 - \$3,750.00 per Month Rental Income

Veterans Administration Program Update:

Lucerne Iseman discussed how the VA program worked and reviewed the VA Data report for the 2015 VA Participants along with an update on VA Participants in 2016.

- VA Billing in 2015: \$105,427.50
- 36 Veteran Work Evaluations were completed in 2015.
- \$20,377.00 in pre-payments was made to SCVRD in 2015.

Outreach:

Kristin Driggers reported on the following activities:

- SCVRA Conference – Greenville 2015
 - Gold Status Vendor: Important conference to inform SCVRD counselors on the different loan programs we offer.
- SCANPO Conference – Spartanburg 2016
 - Met with WoodForest Bank as a possible loans program partner.
- Assistive Technology Expo – March 2016
 - Record turnout for the AT Expo: Great public exposure for both loan programs.

Kristin discussed the importance of social media and quick access to the Loans Program applications.

- Allied Website – www.alliedopportunities.com and Facebook Updates

Adjournment:

There being no further business to discuss, the meeting was adjourned by Preston Coleman at 12:30 p.m.

Wehman Sieling, President

Appendix - E

JUSTIFICATION FOR
SOLE SOURCE PROCUREMENT

SOLE SOURCE CHECKLIST

Yes No A) Is the item needed due to compatibility with equipment, accessories, or replacement parts?
Yes No B) Is the item one of a kind or unique and only available from a single source?
Yes No C) Has the market been researched with the results confirming the criteria for a sole source?
Yes No D) Has the market been tested recently on the applicability of a sole source? If so, when?

Based upon the following determination, the proposed procurement action described below is being procured pursuant to the authority of Section 11-35-1560 of the South Carolina Procurement Code and 19-445.2105 of the Rules and Regulations, 1976 South Carolina Code of Laws.

This Board proposes to procure: **Labor from a targeted group of former Vocational Rehabilitation clients who can work, but are unable to maintain competitive employment.**

as a sole source procurement from (name and address: **Allied Opportunities, 1410 Boston Avenue, West Columbia SC 29170**

Explain any answer noted as YES on the checklist and provide additional information, either below or with an attachment, on the proposed sole source procurement.

Allied Opportunities is a 501(c)3 organization that was formed for the sole purpose of serving Vocational Rehabilitation clients who are able to work, but are not competitively employable due to their disability.

07/01/2009
DATE

SC Vocational Rehabilitation Dept.
GOVERNMENTAL BODY


AUTHORIZED SIGNATURE

Assistant Commissioner
TITLE

NOTES: (1) Enter description of goods or services to be procured.
(2) Enter name of sole source contractor.
(3) Enter the determination and basis for sole source procurement.

The Drug-free Work Place certification must be obtained for sole source procurements greater than \$50,000.

The effective date of the contract/order must be after the effective date of the proposed justification and the justification must be approved by a person with delegated procurement authority.



PROCUREMENT SERVICES

Contract 4400003739

[Back to Initial Screen](#)

Validity Start 06/01/2011

Validity End 06/30/2015

Target Value \$ 3,000,000.00

FEIN 86-1141590

Bid Invitation [5400001085](#)

Contract Notes

Vendor 7000107078

Vendor Address ALLIED OPPORTUNITIES INC

P.O. Box 3197

WEST COLUMBIA SC 29171

District

Telephone (803) 726-7141

E-mail contact@alliedinc.net

Fax Number (803) 822-8948

Minority Status Not Applicable

Vendor Contacts

2 Contacts found, displaying all Contacts.

Contact Name

Function

Phone

E-mail

DRIGGERS, KRISTIN

Primary Contact

(803) 726-7141

kdriggers@alliedinc.net

DRIGGERS, KRISTIN

Emergency Contact

(803) 726-7141

kdriggers@alliedinc.net

Attachments

One Attachment found.

Attachment Title

Date/Time Posted

[intent to award doc](#)

12/07/2015 02:05:00 PM

Contract Items

27 Items found, displaying all Items.

Item Pricing

- 00100 Aiken County - Blue Collar 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
- 00110 anderson County - Blue collar 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
- 00120 Beaufort county - BC 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
- 00130 Berkeley County BC 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
- 00140 Charleston county BC - 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
- 00150 Cherokee county BC 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
- 00160 colleton county - BC 41%
Material Group: 96269 - personnel services, temporary

Agency: Statewide
00170 Darlington County - bc 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
00180 Florence County BC 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
00190 Greenville County bc 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
00200 Greenwood BC 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
00210 Horry county bc 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
00220 Kershaw county 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
00230 Lancaster county 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
00240 Laurens County bc 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
00250 Lexington County wc 36%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
00260 Lexington county bc 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
00270 Marlboro county - Blue 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
00280 Oconee County - blue collar 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
00290 Orangeburg county bc 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
00300 Richland county bc - 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
00310 Spartanburg County bc 41%
Material Group: 96269 - personnel services, temporary

Agency: Statewide
00320 Sumter county bc 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
00330 Williamsburg county bc - 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
00340 York county bc 41%
Material Group: 96269 - personnel services, temporary
Agency: Statewide
00350 nationwide backgroud check
Material Group: 96269 - personnel services, temporary
Agency: Statewide
00360 Drug screening
Material Group: 96269 - personnel services, temporary
Agency: Statewide

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PROCUREMENT SERVICES

[Refresh](#)

Contract 4400010853

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Validity Start 07/07/2015

Validity End 06/30/2020

Target Value \$ 5,000,000.00

FEIN 56-1141560

Bid Invitation [5400009620 - Temporary Staffing Services](#)

Contract Notes

Vendor 7000107078

Vendor Address ALLIED OPPORTUNITIES INC

P.O. Box 3197

WEST COLUMBIA SC 29171

District

Telephone (803) 726-7141

Minority Status Not Applicable

E-mail contact@alliedinc.net

Fax Number (803) 822-8848

Vendor Contacts

2 Contacts found, displaying all Contacts.

Contact Name	Function	Phone	E-mail
DRIGGERS, KRISTIN	Primary Contact	(803) 726-7141	kdriggers@alliedinc.net
DRIGGERS, KRISTIN	Emergency Contact	(803) 726-7141	kdriggers@alliedinc.net

Attachments

2 Attachments found, displaying all Attachments.

[Intent to Award # 2.doc](#)
[Intent to Award.doc](#)

Attachment Title

Date/Time Posted

06/26/2015 05:47:57 PM

06/26/2015 05:48:42 PM

Contract Items

2 Items found, displaying all Items.

Item Pricing

00093 Drug Screening

Unit Price: \$ 35.00

Total Price: \$ 35.00

Material Group: 96269 - personnel services, temporary

Agency: Statewide

00094 Blue Collar - 45% Markup

Material Group: 96269 - personnel services, temporary

Agency: Statewide

Contract for Temporary Personnel Staffing Services

MAXIMUM CONTRACT PERIOD: July 1, 2015 – JUNE 30, 2020

The Materials Management Office has established sources for temporary personnel staffing services as listed herein for Using Governmental Units (UGUs) including all State agencies and local public procurement units within the geographic limits of the State of South Carolina. This does not require the State to use only private temporary personnel agencies when seeking temporary personnel. The State may choose to provide temporary personnel services for UGUs. Purchases by local procurement units are optional. Contractors are available for each county within the State. Contractor will be placed on a qualified provider list that Using Governmental Units (UGU) will utilize when seeking temporary personnel services. Being placed on the qualified provider list does not guarantee that a contractor will be asked to supply temporary personnel.

Awards are made to all responsive and responsible bidders to the state's request for competitive fixed price bidding. The minimum pay rate per hour for each position is listed herein. A **40% maximum mark-up on white collar positions and a 45% maximum mark-up on blue collar positions** are permitted on each position for the fixed price rate allowed under this contract as shown.

During the term of the contract, the state may add additional contractors semi-annually to the approved provider list upon verification of the contractor's qualifications as mandated by the state.

Each contract has been assigned a contract number and this full contract number should be used when the voucher is sent to the comptroller general for payment to assure prompt processing. Contractors should also put the contract number on all invoices.

This information should be passed to the appropriate sections of your agency or unit. Do not hesitate to call this office if there are any questions.

When using a contractor, UGUs will contact a contractor to service their area/location to fill the UGUs need for temporary personnel for the job position desired. If the contractor is not able to fill that need (the inability must be documented), the UGU will refer to another contractor for service. This procedure will be utilized for each job position needed.

Temporary personnel may only be initially assigned to the UGU for a maximum 12 month period. After that, the temporary personnel may be extended for an additional 12 months more in that same job position with UGU approval.

The State has established a list of temporary personnel service job positions and accompanying job descriptions (See below). For job positions needed and not defined in this bid, the UGU will procure for that need in accordance with the South Carolina Procurement Code. **New job positions and the accompanying job descriptions may not be added to the contract by the contractor or UGU. Only the Materials Management Office may add additional positions and accompanying job descriptions.**

The State has also established a **minimum** hourly pay rate for these job positions (See below). Contractors will invoice the State at the hourly pay rate plus the mark-up percentage. UGUs may request that temporary personnel be paid a higher wage than listed in the bid (minimum pay rate – see below). If the UGU requests a higher wage be paid, the contract provider will invoice utilizing the requested wage plus their mark-up.

Kristen Moss, CPPB, Procurement Manager
E-Mail: kmoss@mmo.sc.gov
Telephone: (803) 737-2772

Materials Management Office
1201 Main St - Ste 600
Columbia, SC 29201

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UGUs may request interviews with temporary personnel prior to assignment. These interviews will be at the contractor's expense. Interviews will be no longer than one (1) hour in duration.

Depending on the UGU, the temporary personnel may be asked to sign information security documents, confidentiality documents, acceptable use policies, and access agreements. This does not construe any employment agreement.

It is understood and agreed that any temporary personnel assigned to the UGU is an employee of the contractor and all wages, vacation/holiday pay, insurance and taxes relating to their employment is the responsibility of the contractor.

The temporary personnel must be W-2 employees of the contractor and not 1099 employees ("1099" is the reporting form used to document income paid to a person who is operating as an unincorporated business, IE, as a sole proprietor [the default mode of operation if you do contract work and you don't set up an LLC, a corp, etc]).

Compliance with the Affordable Care Act (42 U.S.C. §18001 *et seq* (2010)) and its related regulations is the sole responsibility of the Contractor and its employees. The State, its political subdivisions and other using entities shall have no responsibility for any payment or cost associated with required contributions, fees, charges, penalties or other payments which are required to be paid by Contractor or the State or its political subdivisions for Contractor's employees for any coverage made available or required to be offered and procured by any employer under the Act.

Travel & Expenses:

The UGU will not pay any extra costs for Temporary Personnel (i.e., benefits, insurance, room and board, and any other additional costs). The UGU will not pay travel costs to the designated workplace for the Temporary Personnel. If a UGU authorizes the Temporary Personnel to attend a meeting or provide services outside the designated workplace, the Contractor may be reimbursed for travel expenses in accordance with the State of South Carolina travel regulations, and subject to UGU approval. PAYMENT FOR THIS IS SUBMITTED THROUGH UGU.

TRAVEL EXPENSES (MODIFIED)

All business-related travel and out-of-pocket expenses must be pre-approved by the designated UGU. As provided in this paragraph, the UGU will reimburse the Contractor for travel expenses the Contractor actually incurs. Travel expenses include only lodging, food, and transportation expenses reasonably incurred and necessary for performance of this Contract. Reimbursement is contingent upon submittal of paid receipts on a monthly basis. Contractor will endeavor to minimize travel expenses and to use the most economical mode of transportation. Meal costs may not exceed \$25 per day in South Carolina and \$32 per day outside of South Carolina or rates established by the South Carolina Comptroller General. Lodging expenses may not exceed the current maximum lodging rates, excluding taxes, established by the U.S. General Services Administration and published at www.gsa.gov. Travel by commercial airlines must be accomplished in coach or tourist class.

Contractor further agrees that it will hold the State, its political subdivisions and other using entities harmless and will fully indemnify the same for any charges, fees, penalties, interest or any sum or cost whatsoever arising from its use of Contractor's employees pursuant to the contract for temporary personnel staffing services, now or in the future, including for compliance under the Act.

The Materials Management Office reserves the right to terminate any contract where the contractor is unable to meet payroll demands or where payroll checks are returned due to "insufficient funds".

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Contractor will perform screening to ensure that the temporary personnel have the skills necessary to perform all duties listed in the position description for the assignment which they are being submitted. This screening must be performed prior to the assignment.

Contractor will conduct a criminal history background check for its employees working under this contract and provide the UGU with the documentation prior to the assignment's start date. The scope will be nationwide and, at a minimum, must include federal, state, and county records for all states where the Contractor's employee has resided in the past seven years and a sex offender registry check.

Assignments may require a drug screening before and during assignment. If the UGU determines it is necessary and requests, the Contractor will conduct a drug screening and confirm a negative drug screen to the UGU. The minimum drug screening requirement is the US Department of Health & Human Services 5-panel DOT screening.

Contractor will be responsible for conducting both checks in accordance with the Fair Credit Reporting Act (FCRA), including all of its notification requirements. The UGU will notify the Contractor if a report will render Contractor's employee unacceptable for the assignment, so Contractor may also comply with FCRA's notice requirements before and after taking adverse action. Contractor should redact sensitive data, including social security numbers and dates of birth, prior to sending documentation to the UGU. The prices a UGU will be billed for a drug screening should be included on the bid schedule.

Contractor must offer timely follow-up service to ensure satisfactory performance of all temporary personnel. Any temporary personnel found to be unsatisfactory within forty-eight (48) hours (2 working days) of assignment will be replaced at no expense to the UGU.

As an option, contractor may provide web-based time sheets and record keeping systems. Any web based system should include on-line invoicing as well as access to prior invoices and payment status. If not using a web-based time sheet/record keeping system, contractor will not invoice the UGU until a signed, original time sheet is received. Only certain authorized UGU Full Time Employees (FTE) may approve temporary personnel time sheets. These authorized UGU FTEs will be identified at the beginning of any assignment. Time sheets may not be approved by any temporary staff.

Contractor will not invoice based on faxed/copied time sheets or time sheets signed by unauthorized individuals. Invoicing shall be in accordance with the standard procedures of the individual contractor.

If the UGU plans to hire temporary personnel as a state employee, the UGU will retain the temporary personnel placed by the contractor on the contractor's payroll for a minimum of thirty (30) calendar days prior to hiring the temporary personnel as a state employee, unless the contractor and UGU agree otherwise.

UGU will utilize temporary workers a minimum of four (4) hours per assignment. Any hours worked over forty (40) hours within one (1) week will be considered overtime. A week runs from Sunday to Saturday when calculating overtime. Overtime must be verified by the UGU prior to billing.

Both the UGU and contractor will have the right to refuse to rehire former temporary personnel who are considered unsuitable. Contractor will also verify that any temporary personnel who have previously worked for another temporary personnel staffing agency have not been let go from any previous assignment with the State.

Temporary personnel must have a current, valid State Driver's License in order to drive a UGU vehicle. Contractor will be responsible for any traffic citation that the temporary personnel receives while driving a UGU vehicle.

Contractor is required to have available testing and training services to improve existing skills of current temporary personnel and/or measure skills of potential temporary personnel for white collar positions. Testing

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services must measure, at a minimum, speed, accuracy and proficiency. Training services provided by contractor must teach proficient use of basic functions and current skills.

Contractor will assign an on-site coordinator who is a full time employee of the contractor (who will be paid as a temporary worker) when an assignment requires ten (10) or more blue-collar temporary personnel (as requested by the UGU). This coordinator will be responsible for insuring that the requested numbers of temporary personnel are present and that all working conditions are acceptable. The contractor coordinator may be a working supervisor if agreed to by the UGU. Contractor, contractor on-site coordinators, and temporary personnel cannot supervise state employees or temporary personnel of other temporary personnel staffing agencies.

Advertisements and information given to temporary personnel by the contractor must accurately describe the position in writing.

Temporary Personnel may request copies from the contractor of all documents they sign for assignments.

Temporary Personnel may not benefit or profit from any assignment of temporary personnel related to this contract.

TEMPORARY PERSONNEL STAFFING SERVICES POSITIONS AND JOB DESCRIPTIONS

NOTE: These position descriptions are designed to be general in nature. These outline duties that may be required. Not every placement will encompass all duties for any position. Specific job duties will be assigned by the requesting agency.

RECEPTIONIST

- *Operates small telephone system.
- *Answers telephone and routes calls promptly.
- *Greet, announces, and directs visitors.
- *Operates copiers.
- *Assists with incoming or outgoing mail or packages when requested.
- *Performs basic clerical tasks.
- *Maintains professional appearance, grooming and dress consistent with desired agency image.
- *Handles outgoing Federal Express, UPS, and other special shipments as necessary.
- *Straightens reception area daily; makes coffee.
- *Other duties as assigned.

CLERICAL SPECIALIST

Kristen Moss, CPPB, Procurement Manager
E-Mail: kmoss@mmo.sc.gov
Telephone: (803) 737-2772

Materials Management Office
1201 Main St - Ste 600
Columbia, SC 29201

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*Checks, analyzes, and classifies, alphabetizes materials, conducts limited research when necessary.

*Makes simple postings to various departmental records.

*Indexes and records information.

*Files information in established files and removes files upon request and matches with reports, correspondence, etc.

*Receives classifies, and routes incoming mail.

*Stuffs envelopes.

*Operates standard office equipment requiring little or no previous training.

*Issues licenses, permits, or other documents in accordance with departmental rules and regulations.

*Prepares reports involving tabulations or posted data and simple arithmetic calculations.

*Receives and issues receipts for payment for licenses, permits, etc.

*Conducts limited research of records for information relating to taxes, titles, judgments, verifications or locations of other records or information.

*Images and/or Microfilms records.

*May require specialized terminology such as legal, medical, etc.

ADMINISTRATIVE SPECIALIST I

*Performs general office management duties.

*Operational knowledge of simple office machines

*Types routine correspondence, purchase orders, administrative forms and reports from copy or draft.

*Posts routine data to various departmental forms.

*Proofreads and corrects drafts grammar, punctuation, and spelling in order to produce error-free work.

*Minimum typing skills 35-50 wpm net

*Proficient in specialized terminology such as legal, medical, etc.

*Acts as backup to Receptionist.

*Catalogues and files disks and tapes with instructions for future use; updates existing records to accommodate changes in material of files.

*Assigns, prioritizes, and works in absence of Supervisor, as directed.

*Responds to public inquiries in a courteous manner; provides information within scope of knowledge or refers to employee of higher classification.

*Takes dictation or transcribes from electronic dictating equipment.

*Assists superiors in a variety of administrative detail manners and supervises office and non-technical operations.

*Ability to meet and deal effectively with clients, associates and the general public.

ADMINISTRATIVE SPECIALIST II

*Composes non-technical correspondence.

*Types and proofreads statistical and financial reports, manuscripts, and manuals.

*Devises, sets up, records and performs on power keyboard a variety of dictated or written material including legal documents, opinions, repetitive letters, complex, priority and confidential items, using a variety of dictation and transcription equipment.

*Compiles, prepares, and processes administrative report forms.

*Functions independently for extended periods of time.

*Organizes assigned work to meet established deadlines.

*Receives and resolves, or refers citizen complaints.

*Minimum typing skills 60 wpm net.

*Coordinates some office functions with other departments.

*Takes part in training and/or orientation of new employees.

*Exhibits poise and self-confidence under pressure; excellent interpersonal skills, adept with people.

*Takes and transcribes dictation from electronic dictating equipment.

*Opens, dates, and routes mail according to instructions concerning destination.

*Prepares correspondence, reports or other materials as assigned.

*Arranges for meetings and conferences and take notes.

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Columbia, SC 29201

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*Maintains control files for matters in progress and follow-up such as appointments, tickler files, itineraries, telephone logs, etc.

*Receives and screens office visitors and telephone calls.

*Coordinates some office functions with other departments.

*Supervises subordinate clerical personnel.

*Composes semi-technical correspondence of average difficulty.

*Performs range of simple and/or routine word processing jobs utilizing sophisticated modern word processing equipment.

*Proofreads and corrects drafts for grammar, punctuation, and spelling in order to produce error-free work.

ADMINISTRATIVE ASSISTANT

*Performs general office management duties.

*Composes and prepares routine correspondence for signature.

*Organizes, develops and implements procedures for recording and filing various administrative forms and reports.

*Secures factual information from files, records and publications.

*Compiles information into standardized reports.

*Independently prepares recurring reports for signature.

*Answers telephone, provides information and receives information concerning matters relating to the employing agency.

*Sends acknowledgments or selects form letters in response to inquiries in accordance with standard instructions.

*Maintains a calendar for the Supervisor.

*Establishes and maintains a variety of files and records.

*Assigns work to subordinate clerical employees.

*Attends meetings and conferences to furnish information and take notes.

*Minimum typing skills 55+ wpm net.

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*Prepares legal documents including warrants, complaints, summons, indictments, and papers for filing and serving.

*Takes part in training and/or orientation of new employees.

*Exhibits poise and self-confidence under pressure; excellent interpersonal skills; adept with public.

*Performs other duties as assigned.

SPREADSHEET SPECIALIST

*Performs mathematical functions and produce graphs.

*Other analytical functions as required.

*Ability to set up or reformat electronic spreadsheets utilizing PC software (i.e. Lotus 1-2-3, Visicalc, Excel).

LEGAL SECRETARY

*Composes and prepares routine correspondence for signature.

*Prepares routine legal documents including warrants, complaints, summons, indictments and papers for filing and serving.

*Opens, dates and routes mail according to instructions concerning destination.

*Sends acknowledgements or selects form letters in response to inquiries in accordance with standard instructions.

*Maintains organizational files and records.

*Maintains control files for matters in progress and follow up such as appointments, tickler files itineraries, telephone logs, etc.

*Receives and screens office visitors and telephone calls.

*Arranges for meetings and conferences and takes notes.

*Takes and transcribes dictation from electronic dictating equipment.

*Exhibits poise and self-confidence under pressure; excellent interpersonal skills; adept with public.

*Devises, sets up, records, and performs on a power key board, a variety of dictated or written materials, including legal documents; repetitive letters; complex, priority and confidential items, using a variety of dictation, transcription and word-processing equipment.

*May require certification as a notary public.

PARALEGAL

- *Assists with all aspects of legal research.
- *Researches public documents, records, and law books for case preparation.
- *Contacts clients for information needed for specific cases.
- *Analyzes and follows procedural problems that arise in various situations.
- *Requires knowledge of law, legal procedures, legal terminology, and must be able to apply this knowledge.
- *Must exercise discretion and confidentiality.
- *Prepares probate inventories, inheritance, or income tax returns.
- *Attends formal meetings with clients and may be required to be present at court proceedings.
- *Preparation of a variety of legal documents.
- *Performs related duties as assigned.

RECORDS MANAGEMENT

- *Experienced in all aspects of records management, including automated filing systems, laser and optical disc conversions, records conversion, etc.
- *Checks, analyzes and classifies, alphabetizes materials, conducting limited research as necessary.
- *Prepares reports involving tabulations or posted data and simple arithmetic calculations.
- *Conducts research of records for information relating to taxes, titles, judgements, verifications, or location of other records or information.
- *May require specialized terminology such as medical, legal, financial, etc.

DESKTOP - PUBLISHING SPECIALIST

- *Experience in all areas of desk top publishing software.
- *Ability to produce documents of high quality with no errors.
- *Works with little or no supervision.

DATA ENTRY OPERATOR I

*Operates one or more of the following types of data entry terminals: keypunch, stand-alone, key/disk, interactive or intelligent. Able to enter, retrieve, edit and store data.

*Keys from simple source documents at 7000 to 10,000 keystrokes.

DATA ENTRY OPERATOR II

*Operates one or more of the following types of data entry terminals: keypunch, stand-alone, key/disk, interactive or intelligent. Able to enter, retrieve, edit and store data.

*Keys from all types of source documents from simple to complex.

*Keys in excess of 10,000 keystrokes.

CASHIER

*Receives cash from customers or employees in payment for goods or services and records.

*Provides receipts.

*Uses adding machines or cash register.

*Minimum six months experience or equivalent education.

ACCOUNTING CLERK I

*Ability to use posting, adding, or calculating machine.

*Maintains or assists in the maintenance of general ledger or subsidiary records of financial transactions.

*Reviews and classifies financial data and verifies mathematical computations.

*Prepares standard financial reports from maintained records.

*Maintains records of receipts and obligations.

*Audits and prepares vouchers for payment.

*Examines checks, vouchers, and other documents for conformance with established laws and regulations.

*Prepares payroll and wage records and makes computations to determine additions or deductions.

*Performs related duties as required.

FISCAL TECHNICIAN I

*Under the direction of supervisor performs assigned duties relating to accounts payable, payroll, and inventory functions involving reviewing of all financial and statistical vendor and employee records and related work.

*Maintains complex set of financial accounting codes as required by State Law and administrative requirements.

*Reviews accounts payable invoices for accuracy, assigns vendor numbers, and verifies purchasing procedures to include correct accounting code.

*Enters and verifies invoice/vendor data placed into computer; generates payable recap for review.

*Researches vendor accounts to handle inquiries either by telephone, correspondence, or direct personal contact.

*Pays vendors upon approval; processes routine monthly payments as approved by supervisor.

*Generates monthly management reports and reports for outside governmental agencies.

*Compiles and generates monthly inventory control reports in conjunction with Purchasing/Supply Control.

BANK RECONCILIATION CLERK

*Assists in balancing accounts by running tapes, proofreading, etc.; prepares summary of balances, cost information, or other reports as requested for use of supervisor in financial statement.

*Reconciles bank statements.

*Verifies computer printouts reflecting status of accounts.

*Prepares summary sheet or other work papers for use of supervisor or auditors in preparing comprehensive financial statements.

*Performs all payroll functions from time sheets through pay checks.

*Gathers, tabulates, proofreads and generates financial data and reports.

*Assists Supervisor as required.

*Audits and proofs accounting or other reports for clerical accuracy and conformance to State and agency procedures.

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*Requires the following abilities:

- Working knowledge of accounting practices and accepted office procedures.
- Ability to perform a volume of numeral detail work accurately and to make difficult mathematical computations with and without mechanical assistance. Ability to operate a calculator by touch.
- Ability to understand and follow complex oral and written instructions and technical terminology.

*Reviews and reconciles payroll and cash disbursement accounts.

*Reviews Accounts Payable aging and vendor statements for problems.

FISCAL TECHNICIAN II

*Checks and approves all vouchers for payment, i.e., prices, extensions, and purchase orders; prepares invoice deduction notices.

*Audits freight bills against freight manifests.

*Answers vendor inquiries.

*Analyzes vendor accounts and negotiates extended terms with vendors when cash is restricted.

*Prepares accounts payable checks monthly.

*Submits jobs for computer requests as required.

*Prints all accounts payable reports and maintains all accounts payable files.

*Prepares analysis of accounts, and assists in monthly closings.

*Develops solutions to a variety of problems requiring use and application of accounting concepts, practices, and techniques as they relate to the agency.

*Prepares daily cash deposits, and fills out cash control sheet daily.

*Enters finalized cash receipts and updates the Accounts Receivable subsidiary ledger by client.

*Obtains and mails invoice copies for clients/citizens.

*Processes daily deposits.

*Files check stubs and bank receipts in the receipt box for the current month.

*Researches and processes citizen claims of invoice payments.

*Researches and processes charge backs, bad checks, etc., and enters same into Accounts Adjustment Control log.

- *Answers accounts receivable telephone inquiries and follows up.
- *Calls and/or mails correspondence to clients/citizens as necessary in order to update accounts.
- *Serves as backup for the Assistant Controller.
- *Collects various accounting data to prepare and analyze financial income and other accounting statements and reports.
- *Requires the following abilities:
 - Working knowledge of accounting theories, practices, and office procedures.
 - Ability to perform a volume of numerical detail work accurately and to make difficult mathematical computations with and without mechanical assistance; ability to operate calculator by touch.
 - Ability to understand and follow complex oral and written instructions and technical terminology.

FISCAL ANALYST I

- *Under general supervision, performs general cost accounting, payroll functions, maintains accounting records and other related duties in daily administration of accounting department.
- *Maintains general ledger to include preparation of journal entries, coding of invoices, account analysis and reconciliation, and monthly closing of books.
- *Coordinates monthly financial statements to include preparation of monthly balance sheets, income statements, reports on changes in financial position/budget variations. Prepares monthly inventory evaluations. Maintains related records.
- *Prepares or assists with the preparation of quarterly reports.
- *Evaluates subsidiary journals for obvious errors and omissions and enters corrected Data into General Ledger. Performs all tasks associated with General Ledger, i.e. Enters monthly journal entries, executes monthly closing entries, executes month end General Ledger (by cost and by natural account).
- *Assists outside auditors at year end to include preparing schedules, invoices; provides explanations of supporting materials and procedures. Prepares any other necessary data.
- *Annually, files all appropriate tax forms and reports with designated agencies.
- *Prepares trial balances.
- *Performs secretarial functions as needed for assigned staff members.
- *Develops and analyzes spreadsheets.

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*Reviews, redesigns and enhances within departmental guidelines the on-line financial statements to insure that information reported properly reflects financial position.

*Maintains records of all financial documents with appropriate supporting materials. Updates records as necessary.

*Reviews supporting schedules to insure that agency's accounting practices are maintained; makes recommendations for improvement where applicable.

*Recommends, designs and implements necessary agency controls.

*Reconciles daily cash flow statements and monitors reconciliation of monthly bank statements.

*Monitors accounts payable duties such as verifying all invoices for payment; ensures expenditures are charged to appropriate accounts.

*Monitors account receivable collection from individuals and/or institutions; interfaces with banks. Monitors reconciled accounts.

*Monitors performance of bank reconciliation monthly; verifies deposit; addresses questions and problems from banking institutions as needed

*Maintains payroll to include maintenance of all records; processing paychecks; computation of Federal and State liability.

*Audits and proofs accounting reports for clerical and conformance to State procedures.

*Maintains cost system, allocating expenditures to accounts in accordance with established procedures.

*Maintains perpetual inventory of supplies and materials and assists in taking physical inventory.

*Requires the following abilities:

- Working knowledge of accounting theories and practices, and accepted office procedures.
- Ability to perform volume of numerical detail work accurately, to make mathematical computations with and without mechanical assistance, and to operate a calculator by touch.
- Ability to understand and follow complex oral and written instructions and technical terminology
- Ability to write legibly.
- Ability to establish and maintain effective working relationships with co-workers, a variety of governmental employees and officials, and the general public.
- Leadership/supervisory abilities.

DOCENT – White Collar Position

* Lead tours for museum or other similar venue

* Engage visitors in conversations and dialogues regarding the museum's collections and history.

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* Ensure memorable and positive visit, including ensuring comfort safety of visitors while fostering educational growth.

* Serve as liaison between staff and visitor.

DRIVER – Blue Collar Position

*Performs driving duties for all vehicles not exceeding 24,000 lbs.

*Maintains routine records/logs.

*May also be required to perform light or heavy labor.

*Responsible for checking vehicle fuel and oil.

*Possesses above average inter-personnel skills for public contact.

CASUAL LABOR (LIGHT) – Blue Collar Position

*Semi-skilled or non-skilled physical light labor duties under direct supervision.

*May include lifting of less than 35 pounds.

CASUAL LABOR (HEAVY) – Blue Collar Position

*Performs manual work with supervision.

*Must be willing to perform sustained work of a physical nature that includes heavy lifting, moving of furniture, etc.

CUSTODIAL SERVICES/LABOR – Blue Collar Position

* Sweeping/Vacuuming

* Empty Trash & Recycle Bins

* Waxing Floors

* Spot Cleaning Carpet

* Cleaning Bathrooms

**TEMPORARY PERSONNEL STAFFING SERVICES
MINIMUM PAY RATE PER HOUR**

<u>POSITION</u>	<u>BASIC RATE/HOUR</u>
RECEPTIONIST	\$ 9.35
CLERICAL SPECIALIST	\$ 9.35
ADMINISTRATIVE SPECIALIST I	\$ 9.60
ADMINISTRATIVE SPECIALIST II	\$10.35
ADMINISTRATIVE ASSISTANT	\$11.35
SPREADSHEET SPECIALIST	\$13.60
LEGAL SECRETARY	\$13.60
PARALEGAL	\$15.60
RECORDS MANAGEMENT	\$ 9.85
DESKTOP-PUBLISHING SPECIALIST	\$ 8.50
DATA ENTRY OPERATOR I	\$ 9.60
DATA ENTRY OPERATOR II	\$10.35
CASHIER	\$ 8.60
ACCOUNTING CLERK I	\$ 8.85
FISCAL TECHNICIAN I	\$10.60
BANK RECONCILIATION CLERK	\$10.85
FISCAL TECHNICIAN II	\$11.60
FISCAL ANALYST I	\$13.60
DOCENT	\$8.00
*DRIVER	\$ 9.60
*CASUAL LABOR (LIGHT)	\$ 9.10
*CASUAL LABOR (HEAVY)	\$ 9.35
*CUSTODIAL SERVICES/LABOR	\$8.00

NOTE: If the Department of Labor increases the minimum wage during the course of the contract above any of the rates listed above, the increased minimum wage amount will become the Basic Rate/Hour for those positions.

* DESIGNATED AS BLUE COLLAR EMPLOYEES

Appendix - F

**MEMORANDUM OF UNDERSTANDING
BETWEEN
SOUTH CAROLINA VOCATIONAL REHABILITATION DEPARTMENT
And
ALLIED OPPORTUNITIES, INC.**

This Memorandum of Understanding, by and between the South Carolina Vocational Rehabilitation Department (SCVRD) and Allied Opportunities, Inc. (ALLIED) supports the provision of staffing services to any and all SCVRD Job Readiness Training Centers. It further provides a framework within which ALLIED may partner with SCVRD to provide services to non-VR applicants/clients.

ALLIED is a Community Based Rehabilitation Program and is a 501(c) (3) Not-For-Profit, Tax-Exempt Corporation. ALLIED also provides the next step in the rehabilitation process to many clients of SCVRD. It provides employee placement services and has the ability to fill a multitude of employment positions. ALLIED may also enter into partnerships with organizations such as the Veterans Administration and SCVRD to assist people of all ages and walks of life to attain their fullest potential and to otherwise accomplish ALLIED's purposes as stated in its By-Laws.

Section I

Term and Modification: This MOU will become effective on July 1, 2012, and will continue in force and effect for a period of five years unless otherwise altered, modified, or rescinded as necessary by representatives of either party. This MOU will be reviewed annually and may be amended by mutual agreement of the parties at any time; however, any amendment must be reduced to writing and signed by representatives of both parties.

Termination: In the event either party desires to terminate the relationship for any reason, written notice of at least sixty (60) days shall be given to the other party after which the parties agree to conclude staffing arrangements and finalize remaining financial obligations within six (6) months of the receipt of such notice. These time periods shall commence upon receipt of such notice, which shall be deemed to have been received no later than five (5) days after transmittal to the addresses indicated below.

Minimum Assignment: Four (4) hours is the minimum assignment length for which our employees will be paid and SCVRD billed.

Safety Program: In an attempt to keep ALLIED's rates competitive, provide the best service possible, and provide a safe work environment for its employees, ALLIED desires to have a mutual understanding of safety and on-the-job injury procedures, practices, and philosophies. Since ALLIED provides Workers' Compensation Insurance for its employees and does not have the day-to-day supervision necessary to ensure safe working conditions, it needs to rely on SCVRD to conduct business in a safe manner and to be compliant with OSHA regulations. The following statements re-emphasize ALLIED's commitment towards safety and the partnership necessary to help reduce accidents in the workplace:

- ALLIED may review at any time the safety audit reports produced by or on behalf of SCVRD's safety and risk-management office; a copy of the procedures and of the safety assessment for any facility in which ALLIED places employees shall be provided for ALLIED's files upon request.
- SCVRD agrees to allow ALLIED to conduct an initial safety evaluation prior to placement of an ALLIED employee and periodically thereafter.
- SCVRD agrees to conduct basic orientation for ALLIED employees in emergency action/fire safety, workplace aggressive behavior, and lock-out/tag-out. Blood borne pathogens exposure control in-depth training will be provided annually. If the ALLIED employee will be working with chemicals, in-depth training will be provided in hazard communication. In addition, if the ALLIED employee will be operating a forklift, training will be provided at times specified in the relevant OSHA standards. Any costs charged by an outside vendor for training of ALLIED employees shall be passed to and be the responsibility of ALLIED or shall be paid directly by ALLIED to the vendor. SCVRD agrees to provide ALLIED with copies of proof of training required by OSHA and by SCVRD's policy.
- SCVRD agrees to place ALLIED employees on the jobs for which they have been assigned and trained. ALLIED employees will be required to wear all appropriate safety Personal Protective Equipment (PPE). Any variance must be reported to ALLIED before work begins.
- SCVRD agrees to notify ALLIED immediately in case of an accident or injury of an ALLIED employee. Additionally, SCVRD will contact ALLIED if medical treatment is required (except when time is critical and emergency response is necessary) to arrange for transportation to the authorized treating facility. SCVRD will allow a qualified representative of ALLIED to conduct an accident investigation, if necessary, and obtain copies of Worklife accident report forms. SCVRD staff will scan or fax the Worklife accident report forms to Worklife HR and to ALLIED.

Required Forms: ALLIED shall provide all applicable forms to SCVRD upon signing of this MOU and will also provide such forms to any SCVRD facility placing an order for services.

Required Acknowledgements: SCVRD shall not allow ALLIED employees to operate machinery, equipment or vehicles without prior specific consent from ALLIED via an accepted job order. It is also understood and agreed that ALLIED employees shall not be entrusted with cash, negotiable or other valuables while performing services for the SCVRD without prior consent from ALLIED. ALLIED and SCVRD agree to obtain insurance coverages for identified risks and to provide copies of certificates of insurance to each other as applicable.

Payroll Process: Employees are paid by ALLIED bi-weekly every other Friday. ALLIED must receive all employees' hours worked by 9:00 a.m. on the Monday following the end of the current pay cycle. Any payroll hours not received by the deadline will be paid the following pay period. Payroll hours shall be submitted via a method prearranged by the parties, e.g., fax, e-mail, etc., on ALLIED timecards. Prior to submitting, all time records must be signed and verified by both the employee and an authorized representative of SCVRD.

Background Checks: ALLIED may verify previous employment and perform basic skills evaluations on all potential employees. Drug screening, criminal background checks and credit checks are required as a condition of employment and will be paid for by ALLIED.

Billing Process: ALLIED's bill rates include Worker's Compensation Insurance, state unemployment taxes and Social Security/Medicare taxes. Bill rates may also include costs of certain special services provided for the SCVRD, if applicable. SCVRD shall be invoiced bi-weekly simultaneously with the payroll process. Payment is due upon receipt of invoice. Additionally, employees will be paid for a minimum of six holidays annually per ALLIED policy. SCVRD will be billed for these holidays at each ALLIED employee's regular rate of pay.

Rates: The Customer Charge Rate (the rate that ALLIED charges SCVRD for services rendered) for employees will be a markup of 32% over the "pay rate" as outlined on the ALLIED Opportunities, Inc. Employee Summary Sheet. This rate shall cover all administrative fees, taxes, and overhead of ALLIED and shall continue to be in force and effect unless modified upon mutual agreement of the parties.

Section II

In addition to the partnership established in Section I, ALLIED also desires to partner with and purchase services from SCVRD for non-VR clients. ALLIED will provide funding to SCVRD in advance of the services being rendered by SCVRD. These services must be mutually agreed upon by the parties and may include assessments, evaluations and other services falling within the parameters of the stated purposes for which ALLIED was created as a 501(c) (3) organization:

- To provide education, employment, training, rehabilitation and opportunities for people of all ages and walks of life. By personal development, through occupational training, and useful employment and by the use of the techniques of rehabilitation, social work and guidance, this corporation shall seek to assist people of all ages and walks of life to attain the fullest physical, moral, emotional, social, cultural, spiritual, vocational and economic development of which they are capable.
- To conduct research and carry out programs directed toward the full development of the human and economic resources of the State of South Carolina.
- To conduct educational and training programs designed to increase the productivity of the State's citizens, and to acclimate them to environments in which they may live and work.
- To forward and promote the health, morale and general welfare and happiness of all persons, and to improve the social and business skills of all persons.
- To provide employment training and education to help persons gain experience in industrial, commercial and service operations.
- To provide work experience to help persons develop work habits and become accustomed to regular production activities and the problems to be met in employment.
- To provide occupation and work therapy to help persons adjust physical strength and mental attitudes so that they may be advanced into regular training programs.

- To provide pre-training service for persons to determine whether they may be expected to qualify for regular industrial activities either in commercial industry or in sheltered employment.
- To provide counseling, educational, vocational training, recreational services, and self-expression opportunities to assist persons in improving educational-vocational and social skills.

Section III

Contact Information:

For Allied Opportunities, Inc.:
 Preston H. Coleman
 Program Manager
 P. O. Box 3197
 West Columbia, SC 29171
 Telephone: (803) 622-6846
 Fax: (803) 822-8948


For SCVRD:
 Richard G. Elam
 Assistant Commissioner
 P. O. Box 15
 W. Columbia, SC 29171
 Telephone: (803) 896-6506
 Fax: (803) 896-6529

Acknowledgement: The signatures of the parties acknowledge the terms and policies stated above. The individual work training center's placement of an order on the SCVRD New Position Referral Form shall indicate acceptance of the terms and policies set forth herein.

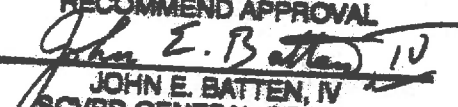
South Carolina Vocational Rehabilitation Department

 Barbara G. Hollis, Commissioner

8-13-2012
 Date

Allied Opportunities, Inc.

 Preston H. Coleman, Program Manager

8.13.2012
 Date

REVIEWED AND
 RECOMMEND APPROVAL

 JOHN E. BATTEN, IV
 SCVRD GENERAL COUNSEL

Appendix - G

RICHARD ECKSTROM, CPA

Comptroller General

SOUTH CAROLINA SPENDING TRANSPARENCY

[Home](#) > [Vendor Detail](#) > [Vendor Year-To-Date Spending Search](#) > [Vendor Search Result](#) > [Category Search Result](#) >
Expense Search Result

You searched for:

Fiscal Year: 2007 - 08
Agency Name: VOCATIONAL REHABILITATION
Vendor/Payee: ALLIED OPPORTUNITIES
Category Title: CONTRACTUAL SERVICES

Expense	Amount
<u>OTHER CONTRACTUAL SERVICES</u>	\$35,000

Displaying records 1 through 1 of 1 found.

RICHARD ECKSTROM, CPA

Comptroller General

SOUTH CAROLINA SPENDING TRANSPARENCY

[Home](#) > [Vendor Detail](#) > [Vendor Year-To-Date Spending Search](#) > [Vendor Search Result](#) > [Category Search Result](#) >
Expense Search Result

You searched for:

Fiscal Year: 2009 - 10
Agency Name: VOCATIONAL REHABILITATION
Vendor/Payee: ALLIED OPPORTUNITIES INC
Category Title: CONTRACTUAL SERVICES

Expense	Amount
<u>TEMPORARY SERVICES</u>	\$78,483

Displaying records 1 through 1 of 1 found.

RICHARD ECKSTROM, CPA

Comptroller General

SOUTH CAROLINA SPENDING TRANSPARENCY

[Home](#) > [Vendor Detail](#) > [Vendor Year-To-Date Spending Search](#) > [Vendor Search Result](#) > [Category Search Result](#) > [Expense Search Result](#)

You searched for:**Fiscal Year:** 2010 - 11**Agency Name:** VOCATIONAL REHABILITATION**Vendor/Payee:** ALLIED OPPORTUNITIES INC**Category Title:** CONTRACTUAL SERVICES

Expense	Amount
OTHER PROFESSIONAL SERVICES	\$75
TEMPORARY SERVICES	\$629,759

Displaying records 1 through 2 of 2 found.



RICHARD ECKSTROM, CPA

Comptroller General

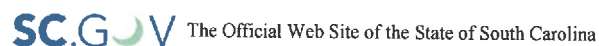
SOUTH CAROLINA SPENDING TRANSPARENCY

[Home](#) > [Vendor Detail](#) > [Vendor Year-To-Date Spending Search](#) > [Vendor Search Result](#) > [Category Search Result](#) > Expense Search Result

You searched for:**Fiscal Year:** 2011 - 12**Agency Name:** VOCATIONAL REHABILITATION**Vendor/Payee:** ALLIED OPPORTUNITIES INC**Category Title:** CONTRACTUAL SERVICES

Expense	Amount
<u>TEMPORARY SERVICES</u>	\$765,219

Displaying records 1 through 1 of 1 found.



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Comptroller General

SOUTH CAROLINA SPENDING TRANSPARENCY

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Expense Search Result

You searched for:

Fiscal Year: 2011 - 12
Agency Name: VOCATIONAL REHABILITATION
Vendor/Payee: ALLIED OPPORTUNITIES INC
Category Title: CONTRACTUAL SERVICES

Expense	Amount
<u>TEMPORARY SERVICES</u>	\$83,661

Displaying records 1 through 1 of 1 found.

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Comptroller General

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Expense Search Result

You searched for:

Fiscal Year: 2012 - 13
Agency Name: VOCATIONAL REHABILITATION
Vendor/Payee: ALLIED OPPORTUNITIES INC
Category Title: CONTRACTUAL SERVICES

Expense	Amount
<u>TEMPORARY SERVICES</u>	\$1,286,845

Displaying records 1 through 1 of 1 found.

RICHARD ECKSTROM, CPA

Comptroller General

SOUTH CAROLINA SPENDING TRANSPARENCY

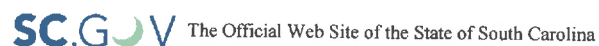
[Home](#) > [Vendor Detail](#) > [Vendor Year-To-Date Spending Search](#) > [Vendor Search Result](#) > [Category Search Result](#) >
Expense Search Result

You searched for:

Fiscal Year: 2013 - 14
Agency Name: VOCATIONAL REHABILITATION
Vendor/Payee: ALLIED OPPORTUNITIES INC
Category Title: CONTRACTUAL SERVICES

Expense	Amount
<u>OTHER PROFESS SERVICES</u>	\$6,225
<u>TEMPORARY SERVICES</u>	\$1,315,565

Displaying records 1 through 2 of 2 found.



RICHARD ECKSTROM, CPA

Comptroller General

SOUTH CAROLINA SPENDING TRANSPARENCY

[Home](#) > [Vendor Detail](#) > [Vendor Year-To-Date Spending Search](#) > [Vendor Search Result](#) > [Category Search Result](#) >
Expense Search Result

You searched for:

Fiscal Year: 2014 - 15
Agency Name: VOCATIONAL REHABILITATION
Vendor/Payee: ALLIED OPPORTUNITIES INC
Category Title: CONTRACTUAL SERVICES

Expense	Amount
<u>TEMPORARY SERVICES</u>	\$1,563,173

Displaying records 1 through 1 of 1 found.

RICHARD ECKSTROM, CPA

Comptroller General

SOUTH CAROLINA SPENDING TRANSPARENCY

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You searched for:

Fiscal Year: 2015 - 16
Agency Name: VOCATIONAL REHABILITATION
Vendor/Payee: ALLIED OPPORTUNITIES INC
Category Title: CONTRACTUAL SERVICES

Expense	Amount
<u>NON-ST EMPLOYEE TRAVEL</u>	\$67
<u>TEMPORARY SERVICES</u>	\$1,368,693

Displaying records 1 through 2 of 2 found.

RICHARD ECKSTROM, CPA

Comptroller General

SOUTH CAROLINA SPENDING TRANSPARENCY

[Home](#) > [Vendor Detail](#) > [Vendor Year-To-Date Spending Search](#) > [Vendor Search Result](#) > [Category Search Result](#) >
Expense Search Result

You searched for:**Fiscal Year:** 2015 - 16**Agency Name:** VOCATIONAL REHABILITATION**Vendor/Payee:** ALLIED OPPORTUNITIES INC**Category Title:** FIXED CHARGES AND CONTRIBUTIONS (OTHER OPERATING)

Expense	Amount
<u>RENT-NON ST OWNED R PROP</u>	\$7,500

Displaying records 1 through 1 of 1 found.

RICHARD ECKSTROM, CPA

Comptroller General

SOUTH CAROLINA SPENDING TRANSPARENCY

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Expense Search Result

You searched for:

Fiscal Year: 2016 - 17
Agency Name: VOCATIONAL REHABILITATION
Vendor/Payee: ALLIED OPPORTUNITIES INC
Category Title: CONTRACTUAL SERVICES

Expense	Amount
<u>NON-ST EMPLOYEE TRAVEL</u>	\$111
<u>TEMPORARY SERVICES</u>	\$1,089,961

Displaying records 1 through 2 of 2 found.

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Comptroller General

SOUTH CAROLINA SPENDING TRANSPARENCY

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You searched for:

Fiscal Year: 2016 - 17
Agency Name: VOCATIONAL REHABILITATION
Vendor/Payee: ALLIED OPPORTUNITIES INC
Category Title: FIXED CHARGES AND CONTRIBUTIONS (OTHER OPERATING)

Expense	Amount
<u>RENT-NON ST OWNED R PROP</u>	\$45,000

Displaying records 1 through 1 of 1 found.

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Comptroller General

SOUTH CAROLINA SPENDING TRANSPARENCY

[Home](#) > [Vendor Detail](#) > [Vendor Year-To-Date Spending Search](#) > [Vendor Search Result](#) > [Category Search Result](#) >
Expense Search Result

You searched for:

Fiscal Year: 2016 - 17
Agency Name: VOCATIONAL REHABILITATION
Vendor/Payee: ALLIED OPPORTUNITIES INC
Category Title: SUPPLIES AND MATERIALS

Expense	Amount
<u>CLOTHING SUPPLIES</u>	\$93

Displaying records 1 through 1 of 1 found.

Appendix – H



January 25, 2017

Mr. Preston H. Coleman
Program Manager
Allied Opportunities, Inc.
P. O. Box 3197
W. Columbia, SC 29171

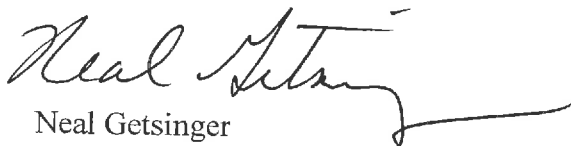
Re: Memorandum of Understanding between South Carolina Vocational
Rehabilitation Department and Allied Opportunities, Inc. - MOU #11086

Dear Mr. Coleman:

Pursuant to the termination provision under Section 1 of the above referenced Memorandum of Understanding between South Carolina Vocational Rehabilitation Department (SCVRD) and Allied Opportunities, Inc., we are notifying you of our intent to terminate this relationship ninety (90) days from today's date.

Please contact me if you have any questions.

Sincerely,



Neal Getsinger
Commissioner

/ng

Cc: Richard Elam, Assistant Commissioner
John E. Batten, IV, General Counsel

Neal Getsinger, Commissioner

The South Carolina Vocational Rehabilitation Department prepares and assists
eligible South Carolinians with disabilities to achieve and maintain competitive employment
State Office • 1410 Boston Avenue • P.O. Box 15 • West Columbia, South Carolina 29170 • scvrd.net
803-896-6500 (Office) • 803-896-6558 (Fax) • 800-832-7526 (Toll free)
803-896-6553 (TTY) • info@scvrd.state.sc.us